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## IMITATION OF THE DENARIUS OF OCTAVIAN AUGUSTUS OF MALA KOPANYA TYPE

**Abstract. The purpose of the article** – the study of imitation denarii of Octavian Augustus of the Malokopan type and the archaeological context of their finds. **Scientific novelty** of the study. The article is the first to identify the source of the Malokopan type denarius and to determine the chemical composition of the imitation alloy using XRF analysis and to suggest the possibility of the local origin of the imitation based on the archaeological context of the finds. **The methodology of the study** includes a combination of archaeological, numismatic, chemical and physical, and general scientific research methods. **The Conclusion.** The article describes the context of numismatic items of the rare Mala Kopanya type. The related finds in the Chelenytsia, Serednyi Hrunok, and Mala Kopanya tracts are analysed. For the first time, the article identifies the type of Augustus coin, which was used as a basis for imitation. Thus, based on the materials of the study, it was established that the basis for the imitation was the denarius of Octavian Augustus which was coined in nineteenth-fourth centuries BC. The chronological boundaries of the denarius minting are correlated with the accompanying



archaeological material discovered during excavations in 2010 and earlier archaeological expeditions in the Chelenytsia, Seredniy Grunok, and Mala Kopanya tracts.

The article also establishes that coins of this type were minted for a long time. This is evidenced by the data of non-destructive X-ray analysis and dies analysis. According to the dies analysis, no die pairs were identified. In turn, XRF analysis revealed differences in the ligature, namely, Zn was found in one of the coins under study, which was completely absent in the second coin, while in the second coin, Fe was found, which was completely absent in the first coin. The content of such an identifying ligature is significantly higher than the margin of tolerance and forms the belief that the coins were minted from different batches of silver with different origins.

**Key words:** imitation, coin, antiquity, Celts, Geto-Dacians, money circulation, minting, XRF analysis, Octavian Augustus, Eastern Europe.

## ІМІТАЦІЯ ДЕНАРІЯ ОКТАВІАНА АВГУСТА МАЛОКОПАНСЬКОГО ТИПУ

**Анотація.** *Мета статті* – дослідження імітації денарія Октавіана Августа Малокопанського типу і археологічного контексту місць їхніх знахідок. **Наукова новизна** дослідження. В статті вперше встановлено джерело для наслідування денарія малокопанського типу та встановлено хімічний склад сплаву імітації з допомогою РФА аналізу та сформовано припущення про можливість місцевого походження імітації на основі археологічного контексту знахідок. **Методологія проведеного дослідження** включає поєднання археологічних, нумізматичних, хіміко-фізичних та загально наукових методів дослідження. **Висновки.** У статті описано контекст нумізматичної пам'ятки рідкісного Малокопанського типу. Проаналізовано супутні знахідки в урочищах Челениця, Середній Грунок та Мала Копаня. У статті вперше встановлено тип монети Октавіана Августа, що був взятий за основу для імітації. Так, за матеріалами проведеного дослідження встановлено, що основою для імітації став денарій Октавіана Августа, 19 – 4 рр. до Р. Х. Хронологічні межі карбування денарія співвідносять із супутнім археологічним матеріалом, що було виявлено під час розкопок 2010 р. та більш ранніх археологічних експедицій в урочищах Челениця, Середній Грунок та Мала Копаня.

У статті також встановлено, що монети такого типу карбувалися протягом тривалого часу. Про це свідчать дані неруйнівного методу РФА аналізу, а також штемпельний аналіз. Зі свого боку, РФА аналіз встановив розбіжності в лігатурі, а саме в одній із досліджуваних монет було виявлено Zn, який повністю відсутній у другій монеті, натомість у другій було виявлено Fe, якого зовсім не було у першій. Вміст такої ідентифікуючої лігатури є значно вищим за межі похибки та формує переконання у тому, що монети карбувалися із різних партій срібла, що мали різне походження. За даними штемпельного аналізу не було встановлено наявності спільних монетних штемпельів для досліджуваних монет.

**Ключові слова:** імітація, монета, античність, кельти, гето-даки, грошовий обіг, карбування, РФА, Октавіан Август, Східна Європа.

**The Problem Statement and Analysis of Recent Researches.** Coin finds are known to be one of the main numismatic sources. However, coin finds have a significant differentiation in terms of information content and scientific significance. The famous British scientist Philip Grierson divides coin finds into “casual or stray finds, hoards, and excavation finds” (Grierson 1975, p. 125). In recent decades, a body of work has been published that mainly describes “casual or stray finds of coins and hoards (Mielczarek, 1989; Mielczarek, 2008; Kotsur, 2017; Myzhin, 2017; Myzhin, Stepanenko & Sytiy, 2019; Orlyk, Kotsur, & Tsyganenko, 2019; Kazakevych, 2021; Orlyk 2022a; Orlyk 2022b; Orlyk 2022; Boiko-Haharin, Sustrietov, & Zadorojna, 2022; Orlyk & Kolesnichenko, 2023; Orlyk & Pyzyk, 2023). Among the corpus of the above-mentioned scientific works, there are also publications that address the problem of the distribution of Celtic and Geto-Dacian coins on the territory of Ukraine and their typology.

However, the most informative for scientists are coin finds made during archaeological excavations. The works of E. Kolnikova and V. Kotyhoroshko (Kolnikova & Kotygoroshko,

2007; Kolnikova & Kotygoroshko, 2009; Kolnikova & Kotygoroshko, 2010) are devoted to such finds, in particular, to the barbaric imitations found in the area of the Mala Kopanya and Chelenytsia complexes. Our article is devoted to coins from the archaeological excavations at Mala Kopanya.

The site in Mala Kopanya became known to the scientific world in the late nineteenth century when a small report by local historian I. Mihalyk published data on individual finds collected in Mala Kopanya (Mihálik, 1893). In 1893, on the pages of the journal “*Archaeologiai Értesítő*”, a teacher of the Sevlus Gymnasium reported the discovery of a number of kurgans and kurgan groups on the territory of the Ugochanska group. He also mentioned the presence of fortifications near the village of Mala Kopanya. Half a century later, beyond the 50’s and 60’s years of the twentieth century, this area attracted the interest of the staff of the Transcarpathian Museum of Local Lore (Peniak, 1980), who examined the territory of the settlement and laid several pits. As a result of the research, this site was introduced into scientific circulation as a settlement of the Hallstatt and Ancient Rus periods. Half a century ago, Mala Kopanya’s peasants were cultivating their land on the upper part of the mountain, unknowingly destroying the ancient horizons. The destruction of the monument stopped only after it attracted the attention of researchers from Uzhhorod State (now National) University, led by V. Kotyhoroshko. Since 1977, the hillfort and its periphery have been subject to systematic study. At that time, systematic annual fieldwork by scientists was initiated and continues to this day. A significant number of residential, household, and industrial objects have been discovered, and a substantial collection of mass and individual material has been collected.

**The publication’s purpose** study the imitation of a coin of the Mala Kopanya type, to supplement information about the archaeological context of the find, to classify the archaeological site, and to establish the origin of the coin.

**The Statement of the Basic Material.** The Mala Kopanya archaeological complex consists of a hillfort in the Horodyshche tract, a landscape sanctuary in the Chelenytsia tract, and a group of burials in the Srednyi Hrunok tract. Today, it is one of the most researched monuments among Transcarpathian antiquities and a reference for the entire Upper Tysa region. The stratigraphic record of the multilayered site includes the horizons of the Stone Age, the Hallstatt period, the Dacian culture of the Turn of the Era, and the Middle Ages. The dominant part of the cultural layer is rich in finds from the 1st century BC to the 1st century AD, associated with the penetration and settlement of the Dacians in the region.

The settlement is located on a mountain (the edge of the Khust-Rokosovo volcanic ridge) on the right bank of the Tysa River on the east side of the village of Mala Kopanya in Berehove (until recently Vynohradiv) district of Zakarpattia region of Ukraine. The height of the mountain on which the fortified settlement is built is 85 m. The total area bounded by the ramparts is 5 hectares. The shape of the monument is close to oval, stretching from north to south. The slopes of the mountain are steep from the east, south, and southwest. The eastern foothills are washed by the Tysa River, while the southern and south-western ones are low-lying. There is a system of two ramparts. The first, the main one, fits into the relief of the southern top, passing along the sides of steep slopes, except for the gentle eastern one, which it crosses. The height of the embankment is 0.4 – 2.2 m, the width is 3.5 – 20 m. The central entrance is particularly well fortified. Another rampart (4 m high) overlooking the Tysa River valley protected the eastern slope of the mountain.

The northern side of the settlement was the most vulnerable, adjacent to the saddle, where the slope was only 15–20 meters high. Therefore, for more reliable protection, two additional ramparts were erected on the northern top of the mountain, which formed a foregarden. The height of the embankments is 1 – 1.7 m, and the width of the base is 8 – 10.2 m. The area between the saddle and the rampart III (Small settlement) does not contain a cultural layer (except for the southern edge), which indicates that it was used only for defensive purposes.

The northeastern periphery of the settlement (Chelenytsia tract) was also covered by an additional system of seven ramparts most likely already in the Middle Ages. They protected the passage from the Khust-Rokosovo volcanic ridge, that is, the most accessible road to get to the site. The height of these ramparts was insignificant. Together with a shallow moat, the total thickness of the fortifications did not exceed 2 m. They had not so much a defensive function as they did not allow vehicles to get to the site in any other way than the main road.

Among the various finds, a special place is occupied by coins, which are among the clearest chronological indicators. The basis of this group is made up of denominations of Celto-Dacian coinage, Roman Republican and Empire denarius and their imitations, as well as Illyria drachms. One of the rarest types of coins found at the Mala Kopanya site is an imitation of a Roman denarius. To date, the discovery of such an imitation is known exclusively at this location. This publication is devoted to its analysis.

The first specimen of the Mala Kopanya coin type (Fig. 1) was published in 2007 in the collection “Carpatica-Carpathia” by E. Kolnikova and V. Kotyhoroshko among a group of random finds of the local population (Kolnikova & Kotygoroshko, 2007).

Given that the scientific collections of the Research Institute of Carpathian Studies of Uzhhorod National University contained only black-and-white photographs of poor quality, and this was the first time such a denomination was encountered, sketching the obverse and reverse was accompanied by certain difficulties. As a result, the description was based on the available image. It was noted that the coin did not belong to the Dacian imitations of Republican denarius known at the time. On the obverse remains an indistinct object resembling a branch, below which is the inscription CAESAR. The researchers noted that similar inscriptions are known on the denarius of Mark Antony of 46–45 BC but based on the probable image of a horse on the reverse, this is clearly not a Roman coin. The scientists cautiously identified the find as a Celtic denomination, most likely of the Pannonian Kapos or Totfolu types of the second half of the first century BC, emphasizing the impossibility of establishing the place and exact time of minting, as this is the first specimen of this type (Kolnikova & Kotygoroshko, 2007, pp. 56–57, fig. 6, 005H).



**Fig. 1. A casual find by local residents (drawing based on a photo from the scientific collections of the UzhNU Research Institute of Carpathian Studies)**

Two years later, the same coin (Fig. 2) was discovered in the southern part of the Mala Kopanya settlement near excavation XXXVIII. It became possible to detail the image.

Obverse: the head turned right with laurel wreath, left side with CAESAR inscription.

Reverse: a horse turned to the left is depicted, and under its feet is a line as a symbol of the water's surface. Below it and above the horse are the remains of indeterminate letters. The only clear sign in the form of the letter S is placed in front of the horse. There are two sticks on the horse's spine, which, according to researchers, could mean a rider or Pegasus wings.

Weight – 1.9 g, diameter – 1.4×1.62 cm.



**Fig. 2. Mala Kopanya. Find a coin near excavation XXXVIII.**

The opinion remains unchanged that this is an imitation of the Roman Republican denarius, but it is difficult to determine which of the coins was used as an example by the Dacian master. The inscription CAESAR is present on the obverse of the coins of Julius Caesar the Elder dated 94 BC, but the head turned to the left belongs to Mars. The coins of Julius Caesar of 54–51 BC with this inscription have an elephant on the reverse. The image on the coin of Mala Kopanya, even with its strong stylization, shows that it is an imitation of the obverse of Octavian's coin of 41 BC with the inscription CAESAR, but here there is no wreath on the head. The reverse of the Republican denarius depicts Pegasus. For example, it was depicted on the denominations of Quintilius Titius of 88 BC, which could have been used by the creator of the image of the Mala Kopanya coin, but it could have been made according to his ideas. The researchers suggested that this find could have been minted at the Mala Kopanya settlement, which could be confirmed or corrected by further finds (Kolnikova & Kotygoroshko, 2009, pp. 136–137, fig. 1–2, 064H).

The linkage to a particular excavation allows us to specify the chronological context of the find, for which we will consider the inventory collection of the investigated area. In July 2009, the research of the southern part of the settlement continued at the Mala Kopanya complex, where an 84 sq. m. cut was made to the northern part of excavation XXXVIII. Its limited area is determined by the location between trees. The site is located on a slope (from the zero-survey benchmark at the top to 3.8 meters at the bottom).

The cultural layer lay immediately below the turf and was 1.4 m thick. It consisted of three distinct layers. The top layer was dark grey earth, the middle layer was yellow clay, the bottom layer was brown clay, and the bedrock was dense yellow clay. The upper layer was filled with small fragments of Dacian pottery. A series of haphazardly placed pits and depressions were recorded on the site. Small fragments of ceramics, charcoal, smear and stones were found in their fill.

During the study of excavation XXXVIII, a significant amount of Dacian pottery was discovered. Ceramics are divided into two groups by manufacturing technology: handmade and pottered. Handmade is classified into subgroups A and B according to its functional purpose.

Subgroup A. Kitchenware made of clay dough with admixtures of grus, sand, and chamotte. It is mainly represented by two types of pots.

Type I. Wide-necked pots with a gently curved rim and a slightly oval body. The neck is decorated with a glued roller with finger impressions. The diameter of the rim (D) is 29–31 cm.

Type II. Small pots with a gently curved rim and the largest expansion in the middle part of the body. One of them was reconstructed. D – 7.7 cm, bottom diameter (d) – 4.5 cm, height (H) – 10 cm. As a rule, pots of this type are decorated with various plastic ornaments. These include stickers, cone-shaped protrusions, and garlands. We should also note the bottom of the pot, which had cross-shaped lines on the base.

A significant group of kitchen ceramics consisted of conical cups with handles. Among the numerous sherds, three restored examples stand out. Their dimensions: D – 6.6 – 14.5 cm, d – 2.6 – 6 cm, H – 4 – 6.2 cm.

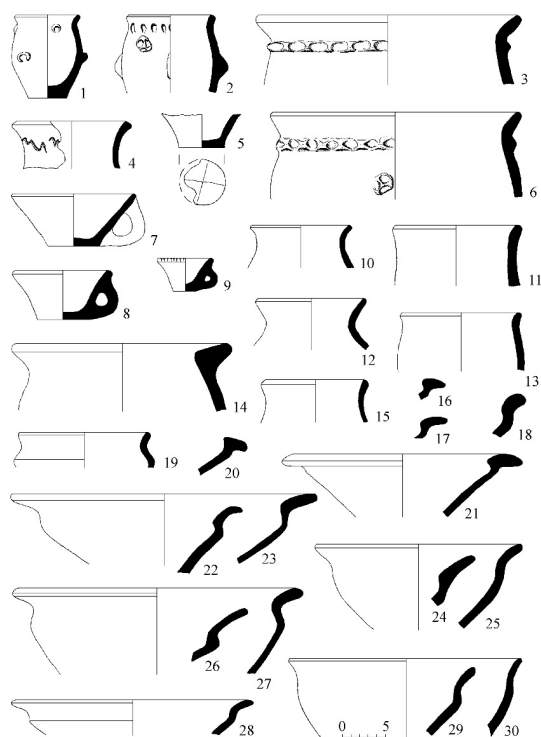
Subgroup B. Vessels made of clay dough with fine chamotte admixture. The surface was covered with black, sometimes brown glaze. The firing is sufficient. The main assortment consisted of pots, korchagi (large earthenware pot), fruit vases and bowls.

Pots. These are vessels with a more or less curved neck, a slightly oval or convex body. D – 12 – 15.2 cm.

Korchagi. They are presented in small fragments, among which a fragment of a massive neck resembling the shape of a pythos neck stands out. The body is open. D – 26 cm.

“Fruit vases”. They were a bowl with a long curved neck, clearly defined shoulders, and a conical body, which was placed on a pallet of different heights. D – 24.5 – 36 cm.

Bowls. They were found in a fragmentary state. A large fragment of a biconical specimen stands out among them. D – 15.5 cm.



**Fig. 3. Mala Kopanya. Handmade ceramics from excavation XXXVIII. (Kotygoroshko, Prokhnenko & Moizhes, 2010)**

Pottery is divided into five subgroups according to the manufacturing technique. All of these groups, with the exception of subgroups G and E, are characterised by the thorough processing of the clay mass, minor admixtures of fine sand and very chamotte, or the addition of both.

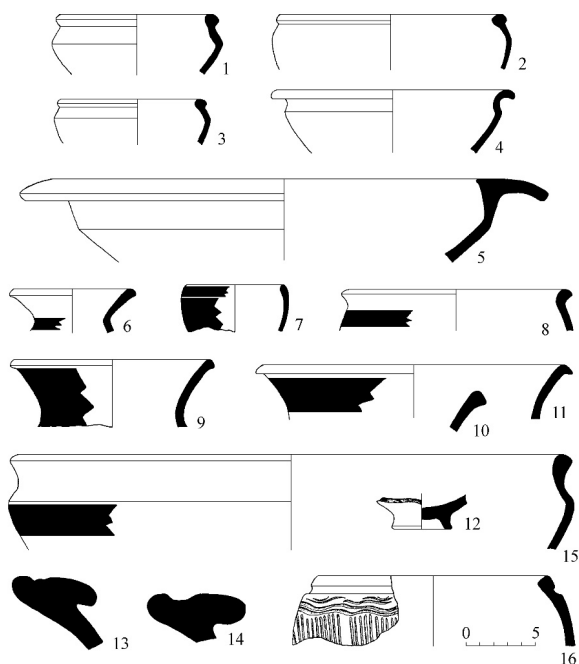
Subgroup A is represented by grey clay ceramics. The firing was uniform, through, and the surface was covered with grey and sometimes black glaze. The main forms are bowls and “fruit vases”.

Bowls. Biconical in shape with a short thickened neck. D – 11 – 16.7 cm.

Fruit vases. Among the numerous fragments, two neck pieces stand out. They are characterised by a sharply profiled neck, clearly marked shoulders and a tapered body, which usually passed into a high tray. D – 18 – 38.4 cm.

Subgroup B is represented by painted ceramics made of thoroughly kneaded dough with very fine chamotte. The yellow surface was covered with dark brown, white and black paint. Basically, these are horizontal stripes of different widths. At the excavation site, this subgroup is represented by fragments of pots, vases and bowls.

A significant number of fragments of pythos and one fragment of a graphite situla are also noted. The diameter of its crown is 17.8 cm.



**Рис. 4. Mala Kopanya. Pottery from excavation XXXVIII.  
(Kotygoroshko, Prokhnenko & Moizhes, 2010)**

A small group of finds from the site consisted of clay, stone, iron and bronze products.

A spinning wheel, 3.5 cm in diameter, 0.7 cm wide and 1 cm in diameter, is made of clay, or rather from the side wall of the vessel.

A more significant group of finds is represented by stone products. These include an “iron”, a fragment of a sharpener and fragments of millstones.



Iron. With a flat base and a conical top. Dimensions: base diameter – 10 cm, height – 9.8 cm.

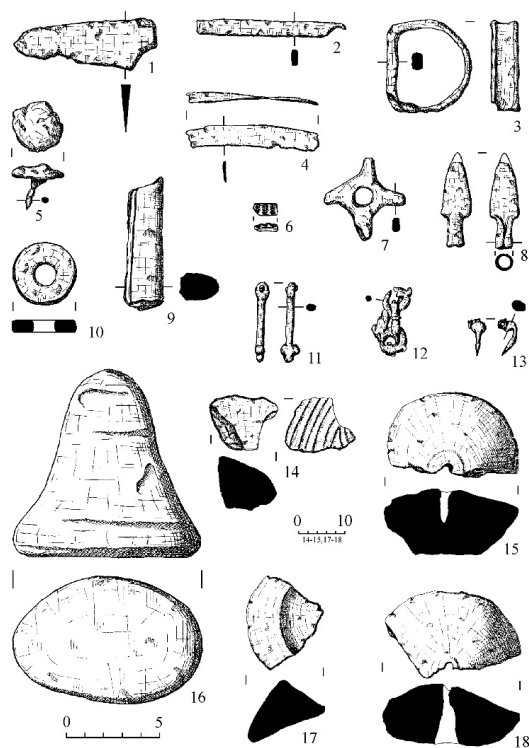
Millstones. They are represented by loungers with a diameter of up to 36 cm and a height of up to 14 cm. The central part has a hole for the trunnion. Among them, an original find is a fragment of a millstone with a working surface with cuts.

A sharpening bar. Hundreds of bars for sharpening piercing and cutting tools were found at the site. This collection also included a fragment of a sharpening bar found in excavation site XXXVIII.

The objects made of ferrous metal are mainly household items. These include a fragment of a knife, a long rectangular plate, a cross-shaped object with a hole in the middle, a braid ring, and a rivet.

A single arrowhead with an elongated triangular nib and an open sleeve is represented. The tip is 5.2 cm long.

The bronze collection includes only a few items. These are a fragment of a belt chain, a pendant, a fragment of a bracelet with notches on the outside, and a small fibula form (A67), typical of the Carpathian area of the early first century AD.



**Fig. 5. Mala Kopanya. Individual inventory of excavation XXXVIII. (Kotygoroshko, Prokhnenko & Moizhes, 2010)**

The analysis of the bedrock obtained during the study of excavation XXXVIII allows us to date it to the end of the first century BC – beginning of the first century AD (Kotygoroshko, Prokhnenko & Moizhes, 2010).

At another location of the archaeological complex, a landscape sanctuary in the Chelenytsia tract, a third coin of this type was discovered in 2010 (Fig. 6).



**Fig. 6. Mala Kopanya. The coin find in the Chelenytsia tract.**

Weght – 1,21 g., Diameter – 1,62 sm.

A thorough analysis of the scientific literature allowed the researchers to conclude that as of 2010, small silver coins with the obverse depicting a stylized head with a laurel wreath turned to the right and a stylized CAESAR inscription to the left are known exclusively from Mala Kopanya. They also found that the symbolism and style of the figure indicate that the motif was adopted from Celtic masters, possibly the reverse of a Totfolu-type drachma. With reference to previous findings, the name of these denominations as the Mala Kopanya type was confirmed and their local production in the second half of the first century BC was emphasized (Kolnikova & Kotygoroshko, 2010, p. 90–91, fig. 3, 078H).

The presence of a third specimen in another part of the site allows us to consider the chronology of the associated material in this case. Since the middle of the first decade of the twenty-first century, research has been carried out simultaneously with the excavations of the Mala Kopanya settlement in the Chelenytsia tract. It occupies an elevation 200 m northwest of the closed settlement. The eastern and northeastern parts of the tract are sloping and difficult to access, and the western part, with a complex terrain, continues the Rokosovo-Khust volcanic ridge.

The relief of the tract is in the form of small waves. The bedrock lies at a depth of 0.5 – 0.6 m, in some areas up to 0.7 m from the modern surface. The material collected during the research allowed us to divide the tract into two parts: northern (Chelenytsia I) and southern (Chelenytsia II). The first part is a cluster of burials, complexes and single finds. Only a few objects (arrowhead, bridle, blacksmith's pliers, fibulae and a fragment of a bracelet) were found on the territory of Chelenytsia II (432 sq. m), which make up a limited collection.

At Chelenytsia I, on an area of more than 5,000 square meters, two dozen soil cremation burials, a dozen weaponry complexes without calcified bones, and numerous individual materials represented by weapons, rods, psalms, spurs, knives, as well as jewellery and clothing items were discovered.

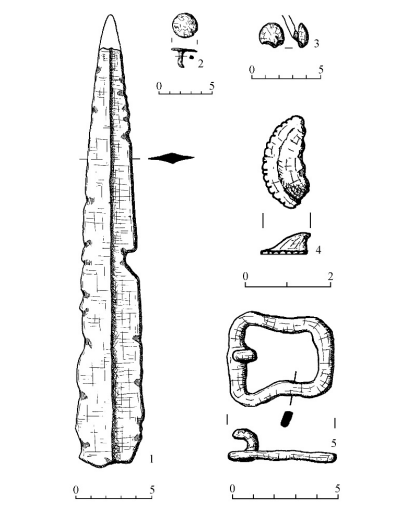
In the field season of 2010, a coin of the Mala Kopanya type was discovered in the area of square M-29 of excavation II in the Chelenytsia I tract. This coin was the third such find at the site. The accompanying material allows us to clarify the chronology of denominations of this



rare type. A spur button, an umbon rivet, a part of a spearhead, a garter buckle and a fragment of a nondiagnostic object were found in the immediate vicinity of the coin's discovery point, which are traditional and massive finds of the Mala Kopanya sanctuary, and therefore fall within the general chronological column of the site.

The analysis of the material obtained during the study of the Chelenytsia tract allows us to date it to the first century BC – early first century AD. In the case of the dating of coins of the Mala Kopanya type, it coincides in the main points with the chronology of the inventory of the excavation of the XXXVIII settlement. Accordingly, on the basis of the chronological attribution of archaeological materials of the settlement and landscape sanctuary, the dating of the denominations can be limited to the end of the first century BC - beginning of the first century AD (Kotygoroshko, Prokhnenko & Moizhes, 2011).

The coins of the Mala Kopanya type were also analysed by K. Myzgin. According to the scientist, this coin was an imitation of Octavian's denarius on the obverse, while the reverse with the image of a horse was of Celtic origin and was borrowed from tetradrachms (Myzgin, 2017, p. 9). As for the obverse, it is difficult to disagree with the author. Since the CAESAR legend is clearly readable, which gives us confidence in the Roman origin of the coin prototype, and the accompanying excavation materials allow us to establish a periodisation within the second half of the first century BC. However, there are significant doubts about the reverse. Indeed, the motif of the horse on the reverse was quite popular with both the Celts and the Geto-Dacians. However, the combination of separate reverses and obverses of different types in one coin is quite rare, or even unique. In such a case, such a coin would not be able to fulfill its main task, namely to imitate a common coin, and would raise additional doubts when payment with these coins. Therefore, this assumption, although it has its arguments, is not sufficient.



**Fig. 7. Mala Kopanya (Chelenytsia tract). Individual excavation inventory II**

In our opinion, the Mala Kopanya type coin is an imitation of an Octavian Augustus coin of 19 – 4 BC (ANS) with a Pegasus on the reverse. Let us consider this coin in more detail:



**Fig. 8. (ANS)**

*Obv. Head of Augustus in profile to right. Legend: CAESAR AVGVSTVS.*

*Rev. In beaded circle Pegasus with raised wings to right. Legend: PETRON TVRPILIAN III VIR.*

For comparison, there is above considered example:



**Fig. 9. Imitation of a coin of the Mala Kopanya type.**

*Obv. Head in profile to right. Legend: CAESAR.*

*Rev. Pegasus with raised wings left. Legend: S, rest illegible.*

The obverse of the coin has only a part of the legend, on the same side of the portrait as in the original. On the reverse, however, we can see that the Pegasus or horse was reflected during minting. Such a defect in the production of coins was common and is still quite common in imitations of the Celts and the Geto-Dacians.

Comparing the metric characteristics of the coins, we can see that the parameters have been reduced compared to the original. For example, the original coins that have survived to this day weighed between 3.58 and 4.12 g (Numista, a), while the imitation weights range from 1.90 to 1.21 g. The diameters of the coins are more similar, measuring 18 mm for the original coin and 16.2 mm for the imitation.

Considering the tradition of minting Pegasus coins in ancient Rome, we can also mention a later coin of 76-77 by Filius Domitianus (Fig. 2).



**Fig. 10 (Numista, b).**

*Obv. Head of Domitian, laureate, right. Legend: CAESAR AVG F DOMITIANVS in a circle around the coin counterclockwise.*

*Rev. Pegasus standing right, left foreleg raised, wings curling up on back. Legend: COS IIII.*

Figure 10 shows that the coin has a similar iconography to the coin of Octavian Augustus and could also serve as a basis for imitation. However, the dating of this denarius does not allow us to choose this coin as the original to imitate, as archaeological research shows that the settlement on the site of the archaeological complex disappeared in the middle of the first century.

The study of the metal composition of certain specimens is of great importance for the study of the origin of Barbarian imitations. The authors analysed two coins, fig. 2 (No. 2 in the table) and 6 (No. 3 in the table), using a non-destructive method of analysis with an express XRF analyser (Expert 3L) that uses the energy dispersive X-ray fluorescence method<sup>1</sup> (see Table 1).

Table 1

**X-ray analysis of Barbarian imitations of the denarius of Octavian Augustus**

| No Coin | Ag   | Cu  | Au  | Pb   | Bi   | Fe   | Zn   |
|---------|------|-----|-----|------|------|------|------|
| 2       | 95.4 | 3.4 | 0.7 | 0.44 | 0.05 |      | 0.03 |
| 3       | 95.4 | 3.0 | 0.9 | 0.34 | 0.01 | 0.37 |      |

The analysis data showed some differences in the composition of the ligature. For example, coin 2 contains Zn impurities in the amount of 0.03, which are completely absent in coin 3, while coin 3 has a rather significant proportion of Fe in the amount of 0.37. Such discrepancies can be explained by the fact that the coins were made from different batches of silver and may indicate that despite the rarity of this type of coin, at least several series were produced. This statement can also be confirmed by the fact that during the analysis of the coins (Figs. 3, 2, 3), no die repetition was found either of the obverse, which is faster to be out of order, or of the reverse, whose dies could be used for a long time.

However, another situation may also be possible. A slight difference in the components can be explained by the percentage of the margin of error, which can sometimes reach tenths of a percent. Therefore, the difference in hundredths could be due to the different environment (tract Horodyshche and tract Chelenytsia) in which the specimens were kept for two millennia. The chemical structure of both specimens, to a large extent, is very similar, and it should be noted that the silver content is significant. This allows us to clarify many points related to the reasons for the imitation of Roman coins. In this case, we are not dealing with counterfeiting of denominations for the purpose of enrichment by reducing the quality of the metal. Although, prior to chemical analysis, the weight of these coins suggested just such an assumption, it was the minting of their own coins based on Roman prototypes in the eastern part of the Carpathian-Danube region to provide the developed trade network with means of payment. Also, at the moment, there is no doubt about the assumption that this type of specimens was produced by the Dacians of Mala Kopanya, at least until a significant number of similar denominations could be found at other sites, which is currently unlikely in the context of the long-term development of modern technologies and archaeological tools.

In conclusion, it should also be noted that a clearly identified prototype still does not provide an absolute date for these finds. Each coin found on archaeological sites has several dating parameters: issue, active use, and archaeologisation, i.e. the moment it entered the soil. On the basis of the Roman original, which was imitated by the Dacians, we can attribute the stage of the issue to the date not earlier than the twenties of the first century BC, and based on the analysis of the accompanying material, we can define the archaeological stage as no

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<sup>1</sup> The range of measured elements is from 0.005 to 100%; detection limits of elements are from 1 to 10 ppm.

later than the thirties of the first century AD, which allows us to limit the use of coins of the Mala Kopanya type to a probable half-century range.

**The Conclusion.** Our study of the imitations of Octavian Augustus coins allowed us to establish a relative chronological framework, within the twenty years BC - early first century AD, which was confirmed by the accompanying archaeological material. The article also reveals for the first time the source of the imitation of the Mala Kopanya type coin and correlates it with the original denarius of Octavius Augustus. This allowed us to narrow down the chronological boundaries of the imitation coinage to the 19 – 4 BC. To find out additional information about the imitation, we conducted an X-ray analysis. By correlating the data from XRF analysis and dies analysis, it was established that this type of coin had a long minting period and could well have been part of the monetary circulation of Barbarian tribes in the region under study.

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**“IN THE FOOTSTEPS OF ANCIENT AFRICA” – UNKNOWN MANUSCRIPT OF YURII SHUMOVSKYI**

**Abstract.** *The purpose* of the article is to analyze and publish the unknown manuscript of Yurii Shumovskyi's monograph "In the Footsteps of Ancient Africa", to clarify its significance as regards archaeology and ethnology of West Africa. **The methodological basis** of the study comprises the principles of historicism, scientific objectivity and systematicity that has enabled an objective understanding of the historical source. In the research, a number of methods have been used, namely, historical and genetic, comparative and historical, historical analysis and analogy. **The Scientific Novelty.** For the first time, the structure of the manuscript has been characterized, its content has been revealed and systematized by thematic group categories of photographic materials, a list of maps has been given, the epistolary with foreign scientific institutions and Ukrainian archaeologist Yaroslav Pasternak has been presented. The information component of the manuscript materials has been determined as the ethnological source of further scientific vision in the field of historical and cultural development of West Africa peoples. Additionally, in the research there has been discussed the author's original way of describing the rituals of African tribes on the basis of not only his own observations, but also a



comparative analysis with the rituals of Ukraine. The history of the scholar's search of ways to publish monographs has been presented. Furthermore, in the study there has been established the importance of integrating the manuscript under consideration into a scientific circulation as it serves as the basis for the development of the courses in African studies of the 20th century, and its material is promising as regards its practical application to study the peoples of West Africa and provide insight into the history of African culture. **The Conclusion.** The study has substantiated the expediency of publishing Yurii Shumovskyi's monograph "In the Footsteps of Ancient Africa" as a valuable ethnological source that highlights the scientific achievements of the Ukrainian emigrant community abroad and needs to be evaluated in Ukraine.

**Key words:** Yurii Fedorovych Shumovskyi, scientific heritage, "In the Footsteps of Ancient Africa", Rivne Museum of Local Lore, West Africa, archaeology, ethnology.

## **“ПО СЛІДАХ ДАВНОМИНУЛОГО АФРИКИ – НЕВІДОМИЙ РУКОПИС ЮРІЯ ШУМОВСЬКОГО**

**Анотація. Мета статті** – аналіз й оприлюднення рукопису праці Юрія Шумовського "По слідах давноминулого Африки", з'ясування її значення для археології й етнології Західної Африки. **Методологія дослідження** ґрунтується на принципах історизму, науковій об'єктивності та систематичності, дотримання яких забезпечило об'єктивне осмислення історичного джерела. У ході роботи послуговувалися комплексом методів, а саме: історично-генетичним, порівняльно-історичним, історичного аналізу й аналогії. **Наукова новизна:** уперше схарактеризовано структуру праці, розкрито її зміст і систематизовано за тематичними груповими категоріями фотоматеріали, подано перелік картосхем, представлено епістолярій із закордонними науковими інституціями й українським археологом Ярославом Пастернаком. Визначено інформаційний складник матеріалів рукопису як етнологічного джерела подальших наукових візій у царині історично-культурного розвитку народів Західної Африки. Обумовлено про оригінальний спосіб опису автором обрядовості африканських племен на ґрунті не лише власних спостережень, а й порівняльного аналізу з обрядовістю України. Викладено історію пошуку вченим шляхів публікації рукопису. Встановлено важливість для історіографії сучасної етнологічної науки введення його до наукового обігу, перспективність практичному застосуванні для вивчення народностей Західної Африки та висвітлення історії розвитку африканської культури. **Висновки.** Обґрунтовано доцільність видання праці Юрія Шумовського "По слідах давноминулого Африки" як цінного етнологічного джерела, що увиразнює наукові досягнення представників української еміграційної спільноти за кордоном і потребує поцінування в Україні.

**Ключові слова:** Юрій Федорович Шумовський, наукова спадщина, "По слідах давноминулого Африки", Рівненський краєзнавчий музей, Західна Африка, археологія, етнологія.

**The Problem Statement.** In modern historiography there is no full-fledged scientific analysis of Yurii Shumovskyi's monograph "In the Footsteps of Ancient Africa" (RRLHM, RKM 15517), who is one of the first Ukrainian researchers of the African continent. In the monograph there are the results of archaeological excavations, ethnological explorations and field observations of the author on the territory of West Africa in 1950 – 1957. Yu. Shumovsky's significant contribution to the study of the African continent deserves recognition in the scientific community, and his achievements – to take a proper place among historical, artistic, ethnological, archaeological and bibliographical studies.

**The Scientific Novelty.** Yurii Shumovskyi's unpublished monograph "In the Footsteps of Ancient Africa", which is preserved in the funds of Rivne Regional History Museum, is a source of convincing and multifaceted information about the scholar's scientific achievements, in particular, the period of his stay on the African continent. The monograph impresses with the scale of accumulated scientific data on religious beliefs and traditional customs of West African tribes, so it can serve as a basis for developing courses on African studies of the 20th century.

The significance of the material consists in the prospect of its practical application for the study of the peoples of West Africa and highlighting the history of African culture development.

**The Analysis of Recent Research and Publications.** The analysis of the issue declared in the article serves as a basis for ascertaining the existence of only one publication about the existence of Yurii Shumovskiy's manuscript, namely Bohdan Stebelskyi's article "The First Ukrainian Archaeologist in Africa" (Stebelskyi, 1991, p. 3), which was published in the diaspora newspaper "The Literature and Art" on June 5, 1991, and it informs readers about the monograph written work by the scholar.

It was impossible to analyse this work in the absence of access to it. After the transfer of the scholar's archive to Rivne Museum of Local Lore from the diaspora, such an opportunity arose. The scholar's manuscript is stored in his funds under the inventory number RKM-15517 addn. The manuscript has not become the subject of research by scholars until today, as the scholar's period of activity in Volyn attracts greater interest.

**The source base of the research:**

– field materials collected by Yu. Shumovskiy during his expedition to Africa, which are kept in Bamako Museum, their copies and originals in the State Historical and Cultural Reserve in Dubno: "Scientific Activity and Works of Fr. Dr. Prof. Yurii Shumovskiy in West Africa in Mali, as an Archaeologist, Director of the French Institute of Black Africa and Founder and Director of the First Archaeological and Ethnographic Museum in Bamako from 1951 to 1957" in two volumes (DSHCR, KN6536/D3818, pp. 1–118; DSHCR, KN6534/D3816, pp. 1–101); "Scientific and Administrative Documents on the Archaeological Work of Yu. Shumovskiy in Africa" (DSHCR, KN6535/D3817, pp. 1–100);

– his own previously published works in the publications of the French Institute of Black Africa "Notes Africaines" (Szumowski, 1954, pp. 102–108; Szumowski, 1953, pp. 35–40; Szumowski, 1955, pp. 673–680; Szumowski, 1955, pp. 65–69); "Africaines" (Szumowski, 1956, pp. 98–102; Szumowski, 1956, pp. 19–23; Szumowski, 1956, pp. 462–508; Szumowski, 1956, pp. 651–654) – which became the basis of the future research "Under the Hot Sun of Africa" (Szumowski, 1956, p. 171);

– contemporary articles in the diaspora magazines and newspapers that gave a scientific assessment of his activities: "The Svoboda" – "Sudan through the Eyes of Ukrainian Scholar" (Vasyleva, 1958, p. 2), "The Chronicle of Volyn" – "Participation of a Member of the IDV in the Congress" (Uchast chlena IDV na konhresi, 1962, p. 122) and the first review of the scholar's scientific works was written by Yaroslav Pasternak – "Abstract on the Scientific Activity of Fr. Mgr. Yurii Shumovskiy, a Candidate for a Full Member of the NTSh" (Canada-Toronto, 1956) (RRLHM, RKM 21259/6 Dop., p. 51);

– the research papers of the scholars of the 1960s on the history of Ghana and Western Sudan: Dmytro Olderohhe "Western Sudan in the 15th – 19th Centuries" (Olderohhe, 1960); Jean Siurie-Kanal<sup>1</sup> "Western and Central Africa" (Siurie-Kanal, 1961); Basil Devidson<sup>2</sup> "New Discovery of Ancient Africa" (Devidson, 1968); Lev<sup>3</sup> Kubbel "Country Rich in Gold" (Kubbel, 1962);

– Yu. Shumovskiy's research papers on archeology and ethnology of Volhynia in the 1930s and 1940s, which are needed for a comparative analysis (Shumovskiy, 1936a, pp. 607–

<sup>1</sup> Jean Siurie-Kanal (1921 – 2007) is a French scholar, Africanist, geographer and historian, anti-colonialist.

<sup>2</sup> Basil Davidson (1914 – 2010) is a British historian, Africanist, an active supporter of the anti-colonial struggle of African peoples.

<sup>3</sup> Lev Kubbel (1929 – 1988) is a Soviet Arabist and Africanist, a leading researcher at the Institute of Ethnology and Anthropology of the Academy of Sciences of the USSR.



609; Shumovskyi, 1936b, pp. 657–659; Shumovskyi, 1941b, p. 4; Shumovskyi, 1942, p. 3; Shumovskyi, 1941a, p. 2; Z pratsi muzeiu v Rivnomu, 1943, p. 4; Muzei u Rivnomu, 1942, p. 1)<sup>4</sup>.

**The purpose** of the article is to analyse and publicize the content of Yurii Shumovskyi’s manuscript “In the Footsteps of Ancient Africa” and clarify its significance to archeology and ethnology of West Africa. Achieving the set up goal implies such basic objectives as: analysis of the thematic relevance of the manuscript for the development of modern ethnology; highlighting the problematic nature of its publication in Ukrainian and foreign scientific institutions.

**The Results of the Research.** Yurii Fedorovych Shumovskyi (1908 – 2003) is a Ukrainian scholar who gained a world name owing to numerous scientific discoveries in the field of archeology and ethnography made in Volhynia and far beyond the borders of the Motherland on the African continent. He is known as an archaeologist priest from Volhynia. He graduated from the University of Warsaw in 1934, from 1934 to 1938 he was a delegate from Volhynia to Warsaw Archaeological Museum, he found the remains of a paleomastadon in the village of Vilihory near Rivne. During the German occupation he was the director of Rivne Museum. In 1944, he emigrated to Western Europe. His life path stretched from Volhynia to the USA through the African continent, in the USA he became Professor at Long Island and Fordham Universities (1960 – 1970)<sup>5</sup>.

In the world scientific community Yurii Shumovskyi is known as one of the pioneers of ancient cultures on the African continent. France appreciated his achievements highly, awarding him with a number of orders and the title of “Honourary Legionary of Honour”, included him into the Ukrainian section of the International Academy of Sciences in Paris, as well as granting him membership in the Association of Historians of France in Paris.

The creative heritage of Yu. Shumovskyi (according to his own bibliographic list) is represented by more than 170 works, among which the unpublished work “In the Footsteps of Ancient Africa” stands out for its particularly informative potential – a reflection of the Ukrainian scholar’s scientific research activity in the distant country Mali, “African Under Sun Land”.

There are 789 sheets of a typewritten text (A4 format) in the manuscript “In the Footsteps of Ancient Africa”, it consists of Introduction (which includes an annotation and dedication), Preface, Textual Material, Bibliography, Historiography, and Summary in Ukrainian and English. At the end, the manuscript contains a list of scientific societies to which the author was a member, a description of his activities in various fields of science and in the pastoral field, awarded honours and awards.

The typewritten material is in Ukrainian. The text is most likely compiled according to the Ukrainian orthography of 1933, because the last period of the scholar’s stay in Ukraine dates back to 1944. Accordingly, during the preparation of the manuscript, Yu. Shumovskyi used the orthography valid until 1946. This is indicated by lexical, stylistic, punctuation norms.

In the manuscript there is the following contents: “1. Introduction, pp. 1–7”, “2. Preface, pp. 7–23”, “3. Geological Structure, Climate, Geographical Location, pp. 23–28”, “4. Prehistoric Man of Africa, pp. 28–59”, “5. Ancient Funerary Cults, pp. 59–73”, “6. Prehistoric Drawings

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<sup>4</sup> Bibliographic and scientific information can be found in more detail in the publication of V. Yaremchuk (2018). Yurii Shumovskyi Ethnographer, Archaeologist: Historiographical Aspect. *Ethnological Notebooks*, 4 (142), 967–975. doi: 10.15407/nz2018.04.967.

<sup>5</sup> Biographical information can be found in more detail from the publication of V. Yaremchuk (2019). Yurii Shumovskyi – a Priest, Ethnographer, Archaeologist: Prosopographical Aspect. *Modern scientific research*, 9, 88–97.

and Engravings, pp. 73–77”, “7. Secrets of African Caves, pp. 77–83”, “8. Grotto Ntegedo, Du Pointe Ghe, Grotto of the Quito District, Grotto du Diabolestre, 83–93”, “9. Grotto de Korunkorekalje, pp. 93–114”, “10. Tabu, pp. 114–125”, “11. Digidigiba, pp. 125–135”, “12. Over the River UENKO, pp. 135–143”, “13. Bankoni, pp. 143–149”, “14. Moribabugu, pp. 149–155”, “15. To Kumbi Saleh, pp. 155–243”, “16. On the Long Road North of the Niger, pp. 243–277”, “17. In the Land of Kaarta, pp. 277–313”, “18. In the Wild Savanna, along the Banks of the Niger and the Bani, pp. 313–339”, “19. In the Sudanese Venice, pp. 339–411”, “20. In the Country of the Dogon Tribe, pp. 411–444”, “21. The Cult of Ancestors among the Moors of Africa, pp. 444–450”, “22. Consumption of a Dog and Cat Meat by the Moors of Africa, pp. 450–453”, “23. Rite of Circumcision and Resection, pp. 453–460”, “24. Something about Sausages, pp. 460–466”, “25. Ancient Funeral Customs and Rites, pp. 466–469”, “26. Adventures in Moribabuga, pp. 469–470”, “27. My Wife’s Adventure with Baboons, pp. 470–476”, “28. Dances of the Peoples of West Africa, pp. 476–486”, “29. Something about the Art of West Africa, pp. 486–514”, “30. Women’s Beauty and Charms, pp. 514–550”. “31. Carpeting and Fabrics, pp. 550–560”, “32. The Use of Masks among the Moors people of West Africa, pp. 560–611”, “33. Pointe Ghe Hospital, pp. 611–619”, “34. IFAN Zoological and Botanical Park, pp. 619–641”, “35. The First Archaeological Ethnographic Museum in the Country of Mali, pp. 641–681”, “36. Pan-African Prehistoric Congress, pp. 681–718”, “37. Scientific Correspondence, Documentation, pp. 718–779”, “38. Bibliography, Biography of the Author and Summary, pp. 779–788” (RRLHM, RKM 15517, p. 789).

The contents of the manuscript “In the Footsteps of Ancient Africa” proves a wide range of interest of Yu. Shumovskiy in the culture of the African continent. The manuscript’s materials are structured in detail, covering 38 short paragraphs that can be classified by the following topics: geology, geography, zoology, botany, anthropology, archaeology, ethnography, museology, folk art, accounts of expeditionary travel, and work.

In the Foreword to the manuscript Yu. Shumovskiy noted that he dedicated it to his native Volhynia, his dear compatriots and Regional Museum in Rivne, hoping that the monograph written by him would be published and become a memory of the archaeological and ethnographic research of a Volhynian on the African continent (RRLHM, RKM 15517, p. 2). In the dedication to a reader, he emphasized: “Let this poorly published book, but sincerely and scientifically worked out, be as a memory of a Ukrainian immigrant archaeologist” (RRLHM, RKM 15517, p. 4).

The preface to the manuscript “In the Footsteps of Ancient Africa” reflects the author’s characteristics of his own work: “written in a light style, richly illustrated, and with its content comprehensively interests the reader, regardless of age or profession, and can be a good book in a home library, scientific material for high schools and libraries and testifies above all to the work and achievements of our immigration abroad” (RRLHM, RKM 15517, p. 7).

In the manuscript after the preface, Yu. Shumovskiy wrote the text with the subtitle “Why I ended up in West Africa?” (RRLHM, RKM 15517, p. 7), which, in fact, became a story about the difficult path of an immigrant – the scholar’s life situation, his emigrant fate, prompted him to search for ways to stay in the scientific field. He began his scientific activity at the Institute of Human Paleontology named after the Prince of Monaco in Paris, and continued at the French Institute of Black Africa in Dakar (Institut français d’Afrique noire – IFAN) in Senegal, where he went at the request of a world-renowned scholar, Professor Theodore Monod. Yurii Shumovskiy was delegated by the Ministry of Colonies to work in the aforementioned institution, performing an archaeological mission. Later, in October

of 1951, he was appointed head of the archaeological department of IFAN in the city of Bamako (a branch of the research institution of the French colonies), and then – as a result of proving himself in this position as a qualified specialist – a director of the institution (DSHCR, KN6534/D3816, pp. 1–100).

At that time the territory studied by Yu. Shumovskyi was a French colony, was defined by the name of Sudan<sup>6</sup>, the present state of Mali and its neighbours.

Let us analyze the content of the monograph as an ethnographic source in further scientific visions of the historical and cultural development of the peoples of West Africa.

The ethnological work of Yu. Shumovskyi is represented by materials which focus on the study of the spiritual and material culture of African tribes (Pel, Dogon, Senufo, Ashanti, Mandingo, Wolof, Bambara, Baule, Tuareg, and the others) with an emphasis on their traditional lifestyle, rituals, folk knowledge and art.

Ethnological studies of the traditional lifestyle of West African tribes cover a wide range of information about their daily life in the 1950s: a family life, family structure and child-rearing, birth and funeral rites, housing construction and its arrangement, food and nutrition, folk medicine and the role of a healer.

The scholar highlighted the worldviews and beliefs of West African tribes, pointing at the dominance of animism in them (a belief in the existence of spirits, the spiritualization of the forces of nature, animals, plants, objects and attributing mental capacity and power to them), establishing that the basis of a traditional and customary system of these tribes there are cults (of plants, animals, natural elements), beliefs (in the afterlife of the soul, the afterlife), rites (circumcision, resection), as well as tracing the close connection of animism with taboos (a ban on certain actions concerning some creature or subject).

In the manuscript Yu. Shumovskyi's understanding of the material culture of African tribes involves an appeal to folk art, in particular, the study of ritual masks, the history of their origin, production, use in religious and magical rites and dances. Thus, in the manuscript you can read descriptions of such trades and crafts as: pottery (use of ceramic products in household and religious rituals), carpet weaving (technology of production, decoration and functional purpose), carving (varieties of wood products), straw weaving (making jewelry), tattoo (application technology, status role, identification content).

It is noteworthy that Yu. Shumovskyi considered folk dances a component of traditional culture, noted their organic combination with the economy organization, household life, customs, rites and beliefs. In addition, he is one of the first to praise the beauty of an African woman, he lists hairstyle options, names and symbolic meaning of the latter.

One of the particularly ambiguous moments of the monograph is the hypothesis developed by Yu. Shumovskyi about the ethnogenesis of the Jewish people, formed on the basis of the study of the Pel tribe through a comparative analysis of the Biblical history of the resettlement of mankind and the ancient migration of the peoples of Asia Minor, Africa, with the argumentation of such a position with numerous artifacts, archaeological finds on the territory of the kingdom Ghana – the Jewish altar, the synagogue, the “tomb of the columns” crypt, pottery, which are examples of Egyptian and Mesopotamian culture. In view of this, the author suggests that traces of the past presence of the Jewish people on the territory of West Africa are associated with the Pel tribe.

The basis of Yu. Shumovskyi's hypothesis about the positioning of the Pel tribe as the descendants of the Jewish people is the knowledge of the history of the Bible and the collected

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<sup>6</sup> Sudan is the main province of the French West African Territory (AOF).

archaeological, ethnological material and oral history of the tribe, and the work of historians and geographers known in the scientific community serves as a confirmation.

There was given a resonant assessment of this hypothesis in the English-language articles published in newspapers and magazines: David Horowitz's publications<sup>7</sup> – (Horowitz, 1965, p. 5; Horowitz, 1965, pp. 1–2); Bernard J. Sharrow's publications<sup>8</sup> – (Barnard, 1981, p. 4; Barnard, 1982, p. 1, p. 4; Barnard, 1982, p. 4); Wolf Gunther Plaut's publications<sup>9</sup> – (Plaut, 1981, p. 2); and the Russian-language newspapers (Shumovskiy, 1960, p. 2; DSHCR, KN6531/D3818, p. 30; Shumovskiy, 1961, pp. 31–32).

Regarding the scientific confirmation of this hypothesis, it is important to say that Yu. Shumovskiy laid the foundation for further searches for the presence of the Jewish culture on the African continent, pointing out that not all issues of the genesis of the Jewish people were fully resolved<sup>10</sup>.

The method of describing the rituals of African tribes on the basis of not only personal observations, but also a comparative analysis with the rituals of Ukraine seems interesting. Such parallels become obvious when reflecting the peculiarities of the family system, funeral rites, celebrating Christmas, and defining the symbolism of miraculous plants.

Yuriy Shumovskiy devoted a separate paragraph of the monograph to the description of the creation of the first archaeological and ethnographic museum in the capital of Mali, Bamako, which at that time functioned as a scientific centre and educational base to the local population (RRLHM, RKM 15517, pp. 641–680).

In addition, the scholar provides information in the manuscript about the discovery of Paleolithic sites in the studied area, which refutes the statement of French scholar that West Africa is poor in monuments of this period (such data were made public at the international archaeological Congress in Algeria in 1952) (RRLHM, RKM 15517, p. 683).

The monograph “In the Footsteps of Ancient Africa” is rich in photographic materials. To form an idea of their scale, informativeness and a potential relevance for use in further scientific studies, we consider it appropriate to systematize the names of the most important photos (we reproduce the content according to the author's inscriptions) according to several thematic groups:

– **architecture of buildings** (“a village mosque in the town of Moribabugu”; “an interior view of one of the houses of ancient Ghana”; “a mosque in the village of Segubugu”; “a typical view of an African village”; “huts of the Malinke, Diola, Oulov tribes”); “mosques in the area of the Niger River, the town of Jenne, the town of Gao, the town of Tombuku”; “the village of the Dogon tribe in the Bandyagara region and the temple of the spirits of the dead”);

– **prehistoric drawings and engravings** (“a prehistoric Neolithic rock drawing represents farmers at work with original agricultural tools”; “a prehistoric engraving of a fish found in the Niger River”; “prehistoric Neolithic drawings in a geometrical form, made with red paint on a rock near the Grotto of Pointe Ghe”; “a rock painting of the prehistoric period, representing a woman from the cult of the mother”; “prehistoric Bushmen drawings”);

<sup>7</sup> David Horowitz (1899 – 1971) is an Israeli economist, the first president of the Central Bank of Israel (1954 – 1971)

<sup>8</sup> Bernard J. Sharrow – no personal information found on the author; there is an assumption that he worked as a correspondent for the newspaper “The United Israel Bulletin” (New York).

<sup>9</sup> Wolf Gunther Plaut (1912 – 2012) – the senior rabbi of the Temple of the Holy Bloom in Toronto, since 1978 – the senior researcher of the latter. From 1977 to 1988, he was the president of the Canadian Jewish Congress.

<sup>10</sup> The scientific hypothesis of Yu. Shumovskiy regarding the ethnogenesis of the Jews in Africa was examined in detail by us in a separate publication “The Lost Descendants of God's People in West Africa” and submitted for publication.

– **African sorcery and rituals** (“an animistic priest – a magician with his entourage”; “disciples of a magician during prayer”; “an African magician – “sorciere” holding a magic wand and hung with amulets”; “magical things of a magician”; “clothes of a magician with many different amulets”; “an African magician prepares for his mission by collecting various magical items”; “gri-gri amulets” charms of a healer”; “a healer treats for a headache”; “homage to the sacred spirits of thunder”; “a religious resurrection ceremony in the tribe of Dahomey”; “sacrifice a dog for the purpose of consuming its meat”; “preparation for the circumcision ceremony”; “the process of the resection ceremony (girls)”);

– **funerary cults** (“a megalithic grave in West Africa during the Iron Age”; “a coffin made of large clay pots with a human skeleton in a sitting position”; “a pantheon of totem statuettes of the cult of the dead”; “a statue of the cult of the dead, a religious reflection of the funeral cult of the Bakota tribe”); “Traditional rite of burial of Prof. Griol of the Dogon tribe in the Bandyagara region”);

– **African dance** (“dancers and musicians enter the square where the dance will begin”; “a rhythmic dance of women”; “a dancer in a mask of a black magic that brings misfortune”; “a dance of the Bambara tribe during the rite of circumcision”); “dancers of the Dogon tribe in various ritual masks of Bandyagara district”; “dance of the Senegalese”; “a military dance of the Moors”);

– **ritual paraphernalia** (“a statuette of the spirit of Nigeru Ba-Faro”; “statues of West Africa reflecting the cult of the mother”; “statues of the Bambara, Senufo, Dogon tribes”; “Simye” and “Tyawara” masks of the Bambara tribe), “Kpeliye–Dogon”, “Do-Baule”; “Dina Senufo”, “a sacred circumcising knife”; “musical instruments “bark””, “tam-tam”, “tambur”, “balafon”, “zither”, “African guitar”);

– **ritual ceramics** (“sacred clay vessels with pictures of plastic animals for cannibalistic ceremony”; “red clay vessels in the shape of a male phallus in the form before and after circumcision”);

– **carpet making** (“Moptian multi-colored woolen carpets, with a predominance of red, white, green, black, yellow color scheme”; “mourning carpet of black colour of the country of Mali”; “an original woolen rug of the Mali tribe with a cabalistic ornamentation”);

– **social classes** (“a millionaire from Dekaru”; “a poor peasant Zita”);

– **a West African woman** (“a hairstyle and jewelry of Pel or Fulani and Bukombe women”; “a hairdresser doing one’s hair”; “a style of clothing and hairstyles of women in Senegal”; “nose decorations of West African women of the Bambara, Bozo and other tribes”; “patterns of tattoos of different tribes and peoples of Mali”);

– **cartographic materials and excavation plans** (“a travel map of one of the first explorers of West Africa, Mungo Park (in English)”; “maps of the countries of Senegal and Mali, the first archaeological map authored by Yu. Shumovskyi based on his numerous experiments”; “French Sudan (West Africa)”; “a map of the Ghana Empire of the Middle Ages (1350)”; “a plan of archaeological excavations in the vicinity of the town of Bamako – Mali”; “a plan of excavations in Kumba Seleh (the capital of ancient Ghana)”; “a map of barrows and ancient settlements along the banks of the Niger River”; “the Kita mountain range map”; “a plan of Yu. Shumovskyi’s trip to West Africa and his archaeological researches”, “a plan of excavations and researches in the village of Nantaka near Mopti”);

– **zoological and botanical worlds of West Africa** (“a very dangerous and tripling snake “mynutka””; “a very dangerous and tripling snake “knife””; “a cute slender gazelle”; “koba” antelope”; “kalas” bird); “hyenas resting”; “ostriches “savanna ballerinas” in the Sahara



zone”; “a very dangerous black scorpion”; “a special kind of Sudanese sheep”; “Sudanese cows “zeb””; “lions resting after hunting”; “a lion and a zebra killed by him; “a geopard cheetah during a delicious breakfast”; “a huge Baobab tree”; “African beehives (on trees)”; “a tsetse fly”; “strophantus bush (a flower, fruits and leaves)”; “trees in the sugar belt of the savannah and steppe “balances””; “rare manatee fish from the Bani River”; “extremely mobile fishing birds, the so-called weavers and their nests above the banks of the Bani River”; “huge bats at sunset usually fly away to hunt”; “an elephant with a baby elephant”; “the menacing and dangerous buffaloes became alert when they saw us”; “the so-called “crowned heron”, which is easily domesticated”; “a large bird, a woodpecker”; “a male pelican and female pelican from Niger”; “a dry palm tree strangled by ficus”; “a little goat, the so-called “Bishkoshon””; “African eagle”; “extremely wise chimpanzees”; “a consumer plant “tare””; “African red pepper “pimon””; “papaya tree”; “Kola nuts” and many others.

The manuscript also contains photographs depicting the life and work of the scholar in Africa, namely: adaptation to the peculiarities of a local life; carrying out archaeological excavations and setting up a tent town; organization of the workplace at the institute and daily housing.

The photographs taken by Yu. Shumovskyi during the expedition are an important source material for further research. Their studies and publication appear as a phenomenon of an expressive component of a material and spiritual culture of West Africa. Owing to them, we can study ritual paraphernalia, dances, trades and crafts, the West African woman, construction, etc.

Yu. Shumovsky’s correspondence with foreign institutions and Ukrainian archaeologists deserves special focus. From Pasternak’s letters, in particular, we learn about his respect for Yu. Shumovskyi’s work in Africa, as well as about the latter’s efforts to find an institution that would act as a sponsor for the publication of his scientific work: after acquiring membership in the Ukrainian Free Academy of Sciences (hereinafter – UVAN ) in the USA (1980), Yu. Shumovskyi intended to hand over that manuscript to this institution, hoping for help in the publication, so for several years he corresponded with the academy on this matter.

In a letter dated February 27, 1981, the researcher mentions the agreement with Mr. Engineer Tchaikovsky that he will print the entire material in an edition of 1,000 copies for \$9,500 in hard and colour binding, indicating the financial ability to pay half of the amount for the publishing house in view of the fact that who already had dozens of orders for the book at \$25 per copy. In order to interest the Presidium of UVAN in the USA in his works, the scholar even attached to the letter copies of his own articles in the English-language and diaspora press (DSHCR, KN6531/D3813, p. 140).

In the end, after several years of correspondence with UVAN, in a letter to its Presidium dated May 17, 1981, Yu. Shumovskyi expressed a categorical disagreement with the reasons for the academy’s refusal to publish his work, pointing out their bias in connection with the availability of information about UVAN receiving financial assistance from certain American foundations, and also denied the irrelevance of his scientific achievements among the Ukrainians, clarifying that the first book “Under the Sultry Sun of Africa” became popular among the Ukrainian emigrants in Poland and was translated into Polish (DSHCR, N. dop. 2397, p. 1).

In the next letter – from 07.01.1985 – to the director of UVAN in the USA, the scholar was openly indignant at the fact of the refusal to publish his book. Yu. Shumovskyi wrote that he was very sorry and even insulted that UVAN did not find it necessary and useful to support the initiative of the first and only researcher of Africa – a Ukrainian and also an immigrant – at the meeting regarding the publication of his book on the ancient culture of Africa. As an argument, he noted that the Soviet side at one time duly honoured Mykluha Maklay for his first experiments in New Guinea, and the immigrant scientific circles “do not want to publish

such a difficult and respectable work about Africa”. Yu. Shumovskiy also emphasized that such a decision by members of the academy irritated the African delegates to the UN and led to a loss of support for UVAN in their environment (DSHCR, KN6531/D3813, p. 140).

Yurii Shumovskiy had no doubt that his 700-page book, richly illustrated, with a completely new material for science, would spread very quickly in the community of the Ukrainian immigrants. To prove the validity of his assumption, he noted that the international organization UNESCO, having received a copy of the book in Ukrainian, planned to republish it in a circulation of one thousand copies in the French, English, and Russian languages (DSHCR, KN6531/D3813, p. 140).

In the outlined sense, it seems justified to also mention the letter of B. Stebelskiy to the Board of UVAN in America dated June 20, 1986, in which he tried to convince the presidium of the academy of the relevance of Yu. Shumovskiy’s work on Africa for the development of Ukrainian science: “I know an archaeologist, Fr. Dr. Prof. Yurii Shumovskiy, has scientific work in the area of African archaeology. While working for the French archaeological mission, he collected interesting materials, written and processed for printing in Ukrainian. Africa is the cradle of humanity, it can have a lot of interesting material for the Ukrainian reader and Ukrainian science. The publication of his works is possible only by some scientific institution that could finance the publication. If UVAN could rise to this task, please let me know about your possibilities...” (RRLHM, RKM 21261/3 Dop., p. 8). An attempt to help publish a book needed by Ukrainian society both in exile and at home was the creation of an initiative group, which, in addition to the author, included T. Baker, L. Horodetska, B. Stebelskiy, I. Hoshovska, I. Kulchynskiy. The group drew up a retraction dated August 23, 1986 with an appeal to “Honorable Patrons, Scientific Workers, University Professors, to Ukrainian Scientific Institutions, to the Ukrainian Doctors Association, to the Ukrainian Church Union, Ukrainian Credit Banks, Ukrainian Church Organizations, to the Most Reverend Bishops, Pastors and Preachers and to the Honorable Citizens and Brothers and Sisters in Christ” with a request to donate to the publication of Yu. Shumovskiy’s monograph (DSHCR, N. dop. 2393, pp. 1–3).

The response stated that: “By publishing this book, we will learn the secrets of the life and past of those peoples and win the affection and love of the formerly enslaved peoples of Africa, who got their independence, and we will prove to the world that our scholars in immigration work intensively for the good of science without differences of national trends and races” (DSHCR, N. dop. 2393, p. 1). The initiative group appealed to the editorial office of “The Svoboda” newspaper with a request to publish a retraction on its pages to inform of the situation, first of all, as many representatives of the Ukrainian diaspora as possible.

In this context, it is logical to quote the impressions expressed by the head of the NTSH in Canada, B. Stebelskiy, after reading the monograph: “This wide world of scientific horizons breaks through the lines of the great work of “memoirs”, which are by no means only the memories of a tourist who travelled in Black Africa, but a scholar who, on the basis of his own experiments in many sciences, draws conclusions in a very accessible and favourable form for the reader and leads him into an interesting, new and unknown world of man, with his defined race, distinctive psyche, own material, social and spiritual culture” (Stebelskiy, 1991, p. 3).

It is known that Yu. Shumovskiy made a request to a number of scientific institutions for help with the publishing of his book, attaching a copy. Among such institutions, we should mention the Institute of Archeology of the Academy of Sciences of Ukraine, the learned secretary of which, candidate of history sciences Dmytro Nuzhnyi in a letter dated September 25, 1992, expressed his gratitude for receiving the copy, noting: “Of course, Your memories, as the first Ukrainian ethnographer and archaeologist in Africa, who made a significant contribution to the study of this continent, deserve high praise. As a popular scientific publication, your book is also a valuable historiographical source

that complements our ideas about the formation and development of archeology and ethnography of Africa, most importantly, it reflects the direct contribution to this matter of specialists from Ukraine. Practically, this is the first monograph in the Ukrainian language dedicated to the description of prehistoric excavations in Africa, moreover, written by the author based on his direct observations and memories. I must note that, according to my data, the system of the Academy of Sciences of Ukraine currently lacks not only institutions, but also individual specialists who would study archeology or ethnography of Africa” (DSHCR, N. dop. 3260, p. 1). However, in the issue of publishing the monograph, the scholar was also refused by ANU, which justified its decision by financial reason.

In 1998 after a long correspondence aimed at solving the problem with the publication of the book, Yu. Shumovskiy bitterly summarized that the results of his painstaking work on the African continent would never become available to the general public. The letter with the title “My Dear Gentlemen and Compatriots!”, published on the pages of the newspaper “The Redut”, has the following lines: “I was the first Ukrainian to explore old, distant Africa, and my wife was the first representative there among the African tribes. I am very sorry that our Academy of Sciences in Kyiv does not find opportunities to publish my monumental work on Africa, because I, as an immigrant scholar, a pensioner, do not have the money for it. If there was a patron in your country, our region and our science and the young generation would be grateful” (DSHCR, N. dop. 2391, p. 1).

Despite his efforts, Yu. Shumovskiy did not see a printed book during his lifetime, which became a material expression of his significant contribution to the study of West Africa. Therefore, today it is up to contemporaries to prepare the manuscript of Yuriy Shumovskiy “In the Footsteps of Ancient Africa” for publication, as well as to answer the question why the monograph, which deserved a high appreciation of specialists, which complements the idea of the formation and development of archeology and ethnography of Africa, is the first book on this topic in the Ukrainian language, was not published either in America or in Ukraine.

**The Conclusion.** The scientific achievements of Yu. Shumovskiy, presented in the unpublished work “In the Footsteps of Ancient Africa”, reveal his research obsession and passion, which were the driving force behind the knowledge of the culture and lifestyle of the peoples of West Africa. The mentioned monograph appears as a confirmation of the importance of the achievements of Ukrainian emigrants abroad and deserves to be published in Ukraine for recognition and proper appreciation at the latest stage of the development of Ukrainian science. Taking into consideration the placement of the monograph “In the Footsteps of Ancient Africa” by Yu. Shumovskiy in a worthy niche of the historiography of modern ethnological and archaeological sciences, which will preserve its existence in libraries and archives, open access to it for cultural workers and Ukrainian scholars, its publication seems to be an expedient and rational solution. The logic is clarified of such a step of recognition of Yu. Shumovskiy’s work by the French scientific community, which is an indicator of the significance of the Ukrainian scholar’s research activity in the world scientific space.

Despite the above mentioned, the most valuable achievement of Yu. Shumovskiy, which can be read between the lines of the manuscript “In the Footsteps of Ancient Africa”, is the author’s love for his homeland – Ukraine, Volyn, and hence the desire to prove the ability of the Ukrainians to glorify their people even abroad by publishing their own research achievements and develop world science.

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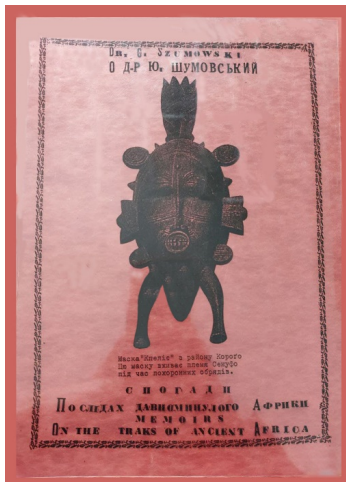
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## Illustrations



1. Fig. Yu. Shumovskiy. In the Footsteps of Ancient Africa. 1989. A4 format paper. Rivne Regional Local History Museum. RKM 15517 Add. Rivne. External Title Page



2. Fig. Yu. Shumovskiy. In the Footsteps of Ancient Africa. 1989. A4 format paper. Rivne Regional Local History Museum. RKM 15517 Add. Rivne. Inner title page. P. 1

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**ANCIENT UKRAINIAN JEWELRY “YAHNUSKY” AS MEMORIALS  
OF THE 17th – THE BEGINNING OF THE 21st CENTURIES**

**Abstract.** *The purpose of the research is to analyse the original heart-shaped female dukachi-yahnusky, which remain in private and state museum collections of Ukraine, and the data of literary sources, which are used to trace the aspects of the ancient jewelry spread of this type in the domestic cultural space during the 17th – 19th centuries, as well as their later “replicas reconstructions” that have been used by Ukrainian women since independence. The methodology of the research is based on a set of dialectical, semasiological, semiological, hermeneutic, historical genetic, historical chronological, comparative (historical comparative), idiographic, historical cultural, prosopographic, inductive and deductive methods. The scientific novelty of the research consists in determining the local historical and cultural specificity of the spread among the Ukrainians of the 17th – the beginning*

of the 20th centuries of wearing the original dukachi in the form of a heart (sometimes in combination with a bow). Separate sources of inspiration have been singled out that had influence on the spread of such jewelry in the territories of Kyiv region, Cherkasy region, Poltava region, Chernihiv region, Sumy region, Kharkiv region, Voronezh region, and Kursk region, populated by the Ukrainians or compact groups of the Ukrainians during the period under analysis. There have been distinguished varieties of ancient “folk” jewels, primarily, made of copper alloys, bronze, nickel, and silver; and “panskyh” (first of all, made of silver, sometimes gold plated) objects, and in modern universal everyday “replicas” – zamakovykh (zinc alloy with aluminum, magnesium and copper), non-silver (copper, nickel, zinc alloy), brass, cupronickel, silver, gilded yahnusky. **The Conclusion.** It has been determined that wearing of yahnusky played a special role among the Ukrainian women’s jewelry, which originated in the circles of the Cossacks of the Baroque era. The connection between the beginning of the tradition and the spread of such neck and chest ornaments talismans was outlined at the end of the 16th century (the age of Mannerism) in Europe at the initiative of Pope Urban V (since 1594). The spread of the fashion for the symbol of the Sacred Heart of Jesus Christ in the ensemble of outfits from this time has been traced, first in the western Ukrainian territories (as an imitation of the ancient of wearing medallions of various shapes, where ducat was understood as a ducat – a metal coin minted in Venice from the 13th century, and from the 14th – in Hungary, Austria and Poland). It has been discovered that these ornaments of the national women’s costume had been found in Kyiv region since the second half of the 17th century. It has been noted that the commemoration of the feast of the Sacred Heart of Jesus coincided in the Baroque era with the spread of fashion in courtly women’s European costume to wear whimsical, decorated in the style of clothing of French favorites, in particular, the Marquise de Pompadour, heart-shaped wax dukachi with bows and frills around the neck instead of a cross, which corresponded to the aesthetic requests of the Baroque and Rococo for the demonstration of virtues and readiness for love. There have been analysed the ancient examples of dukachi, including their wedding varieties, made on the territory of ethnic Ukraine at the end of the 18th and the beginning of the 20th centuries, which preserved in domestic private and state collections. There have been singled out the objects among them originating from Kyiv region, Cherkasy region, Poltava region, Chernihiv region, Sumy region, Slobozhanshchyna.

**Key words:** ancient Ukrainian jewelry, “yahnusky”, jewelry shops, the 17th – the beginning of 21st centuries.

## СТАРОЖИТНІ УКРАЇНСЬКІ ЮВЕЛІРНІ ПРИКРАСИ “ЯГНУСКИ” ЯК ПАМ’ЯТКИ XVII – ПОЧАТКУ XXI ст.

**Анотація.** Метою статті є аналіз оригінальних жіночих дукачів-ягнусків у формі серця, що збереглися у приватних і державних музейних колекціях України, та даних літературних джерел, за якими прослідковуються аспекти поширення у вітчизняному культурному просторі старожитних прикрас такого типу упродовж XVII – XIX ст., а також їхніх пізніших “реплік-реконструкцій”, що ввійшли до вжитку українок від доби незалежності. **Методологія дослідження** охоплює сукупність діалектичного, семасіологічного, семіологічного, герменевтичного, історико-генетичного, історико-хронологічного, компаративного (історико-порівняльного), ідіографічного, історико-культурного, просопографічного, індуктивного і дедуктивного методів. **Наукова новизна** дослідження полягає у визначенні локальної історико-культурної специфіки поширення у колах українців XVII – початку XX ст. носіння оригінальних дукачів у вигляді серця (подеколи у поєднанні з бантом). З’ясовано окремі джерела інспірації, що вплинули на розповсюдження подібних прикрас на теренах Київщини, Черкащини, Полтавщини, Чернігівщини, Сумщини, Харківщини, Вороніжчини, Курщини, населених в окреслений відрізок часу українцями або компактними групами українців. Розмежовано різновиди старовинних “народних”, – насамперед, виконаних з мідних сплавів, бронзи, мельхіору та срібла; і “панських” (передовсім вироблених зі срібла, інколи золочених) предметів, та в сучасних універсальних повсякденних “репліках” – замакових (цинковий сплав з алюмінієм, магнієм та міддю), нейзильберових (сплав міді, нікелю, цинку), латунних, мельхіорових, срібних, золочених ягнусків. **Висновки.** Встановлено, що з-поміж українських жіночих прикрас, носіння яких зародилося у колах козацтва доби бароко, особливу роль відігравали ягнуски. Окреслено зв’язок започаткування традиції на поширення таких нашийно-нагрудних оздоб-оберегів наприкінці XVI ст (доба маньєризму) на

теренах Європи з ініціативи Папи Урбана V (від 1594 р.). Простежено розповсюдження моди на символ Святого Серця Ісуса Христа в ансамблі strojів з цього часу спочатку на західноукраїнських теренах (як наслідування давньої традиції носіння медальйонів різних форм, де під дукачем розумівся дукат – металева монета, що з XIII ст. карбувалася у Венеції, а з XIV – в Угорщині, Австрії та Польщі). З’ясовано, що означені оздоби вітчизняного жіночого костюма зустрічалися на Київщині ще від другої половини XVII ст. Зазначено, що вишанування свята Святого Серця Ісуса збіглося в епоху бароко з розповсюдженням у куртуазному жіночому європейському костюмі моди носити замість хреста на шії примхливі, прикрашені в стилі одягу французьких фавориток, зокрема, маркізи де Помпадур, дукачі із воску в формі серця з бантами і дармовисами, що відповідало естетичним запитам бароко і рококо на демонстрацію чеснот і готовності до кохання. Розглянуто старожитні приклади пам’яток, у тому числі їх весільні різновиди, виготовлені на теренах етнічної України наприкінці XVIII – на початку XX ст., що збереглися у вітчизняних приватних і державних колекціях. Серед них виділено предмети, які походять з Київщини, Черкащини, Полтавщини, Чернігівщини, Сумщини, Слобожанщини.

**Ключові слова:** старожитні українські ювелірні прикраси, “ягнуски”, пам’ятки, ювелірні цехи, XVII – початок XXI ст.

**The Problem Statement.** Yahnusok (yahnus, yahnusyk, yahnusek, yahnusik, ahnus, ahnusok, ohnusok, ohniusok) is the name of an ancient heart-shaped dukach ornament (sometimes with a bow), which is common in Naddniproshchyna (more often on Left Bank) and Slobozhanshchyna from the 17th to 18th centuries, derived from the Old Slavic term “Ahnets” (“Lamb”). The sources of inspiration for such products are rooted at the same time in the traditions of wearing medallions, known since the ancient times, and the fashion for “shymelinnia” (making noise) from coins among eastern peoples (starting with the Scythians, the Sarmatians, the Polovtsi, etc.). In domestic jewelry, from the Baroque era to the present day, jewelry gained considerable popularity, but until now it was not covered by historians of culture and art, museum workers sufficiently.

**The Historiography of the Issue.** The Ukrainian historians began to do research on yahnusky in connection with the study of antiquities in museum collections mainly. Doctor of Historical Sciences Ivan Spassky, a specialist of Nizhyn District Museum, Kharkiv Historical Museum, a renowned expert in the field of numismatics, could be named the first in this series. In 1970, he published the monograph “Dukaty and Dukachi of Ukraine. Historical and Numismatic Study” in “Naukova Dumka” (Scientific Thought) Kyiv publishing house, in which yahnusky were also mentioned on page 38 (Spaskyi, 1970, p. 38).

At the same time, Kyiv publishing house “Naukova Dumka” (Scientific Thought) also published a monograph by Candidate of Art History, Mark Petrenko, “Ukrainian Goldsmiths of the 16th – 18th Centuries”, but he did not focus on Dukachi (Petrenko, 1970, p. 18). However, the permission to study the jewelry heritage gradually attracted wide sections of the population to scientific research work in the defined area, which affected a number of local history publications of individual source scholars in the next few decades and the awareness of its purely “folk” (mainly represented by copper, bronze, nickel silver, nickel and silver) and “panskykh” (primarily silver, gilded) varieties.

Almost 40 years after these publications, Kyiv publishing house “Rodovid” published a monograph, written by Lviv researcher, Candidate of Art History, Hanna Vrochynska “The Ukrainian Folk Women’s Jewelry of the 19th – at the Beginning of 20th Centuries” in 2007, (Vrochynska, 2007, pp. 3–230), and a wider community was interested in various domestic neck and chest accessories depicted in the above-mentioned monograph, in particular, dukachi, which had their own artistic characteristics from among ancient Ukrainian ornaments.



Over the next few years, numerous articles were published about the dukachi of Eastern Ukraine, in which the features of the yahnusky began to emerge gradually.

Hence, I. Dunaina in the research “Dukachi and Estuaries from the Collection of NIEZ “Pereyaslav” (2009) elucidated the distribution of the types of jewelry indicated in the title of the publication from the second half of the 17th century (Dunaina, 2009, pp. 116–117). Valentyna Nesterenko, Deputy Director for Scientific Work of Cherkasy Regional Museum of Local History did an in-depth analysis of the ancient samples preserved on Left Bank for the next several years. Valentyna Nesterenko began her research in the mid-2000s (Nesterenko, 2007). The scholar was one of the first to study woven, horned and the so-called “Veremiyiv” (flower-like) dukachi with bows in Cherkasy region (Nesterenko, 2010), the specifics of their “beautification” (decoration with patterns of stripes and dashes), additions with glass and beaded inserts, gilding.

At the same time, the author indicated the localization of goldsmithing in Cherkasy region by specific settlements: “the villages of Melnyky, Kropyvna, Irkliiv, Veremiyivka, Vasiutynsi, Helmiiaziv and the city of Zolotonosha”, the scholar also mentioned Chornobai, Halytske, Zhovnyna, Zahorodyshche and specific craftsmen. There were mentioned, in particular, “Strannyk” from Zhovny and Chornobayiv (who had his own students and a bad reputation), the Hetman family representatives (a father and his son and daughter), I. T. Marynets from Zhovny. In 1920s one dukach cost 5 krb in the above-mentioned master from Zhovny (Nesterenko, 2010).

At the same time, the scholar specified the materials from which dukachi were made in Cherkasy region – brass, copper, silver alloy of Polish origin (remelted kuverty, etc.), tin solder (Nesterenko, 2010).

Later on, certain types of dukachi with brass chains, similar to the exhibits from the numismatic museum collection “NIEZ “Pereyaslav”” of the last quarter of the 18th century, became the subject of interest of Oleksandr Yurchenko from Pereyaslav-Khmelnytsky (Yurchenko, 2013, pp. 168–169).

At the beginning of the 2010s, other studies on dukachi were carried out, in which, however, there was no focus on yahnusky. These were some of Oleksandr Samkov’s significant publications. First of all, his “Essays on the History of Goldsmithing in Cherkasy Region” (Samkov, 2010, pp. 2–105), was devoted to the development of bow forms in dukachi, and the book “The Ukrainian Dukachi”, (Samkov, 2013, pp. 3–132), in which the focus was on the typology of the forms of such products of the end of the 19th and beginning of the 20th centuries.

The issue regarding the origin of different types of dukachi was discussed in the article by Kateryna Volik, a scholar of V. Stefanyk Precarpathian National University, in a year. The author came to the conclusion about “coin” and award coronation (for merits before the crown), or funeral (posthumous, on the theme of “The Virgin – Queen of Heaven”) “medal” (varieties of dukachi) that were common in the Ukrainian attire in Cherkasy, Poltava, Slobozhanshchyna, the towns of Nizhyn, Chuhuiv and Baturyn from the 17th to the beginning of the 20th century. At the same time, the scholar clarified that from the 1860s, according to Mykola Sumtsov (Sumtsov, 2008, p. 234) the quality of jewelry in the Ukrainian traditional costume decreased gradually (Volik, 2014, pp. 57–60).

These works became the basis for the compilation in 2014 of Lviv Institute of Collecting Ukrainian Art Monuments at the National Academy of Sciences, together with its ideological mover Taras Lozynsky, the album “The Ukrainian Goldsmithing. Dukachi [Ukrainian

born jewelry of the end of the 18th century and until the 1930s]”. O. Valko, O. Samkov, Yu. Kovalenko acted as the editors and authors of the foreword in this publication. The photos made by O. Lozynsky, A. Kis, Yu. Kovalenko were used when preparing the album (Ukrainske zolotarstvo, 2014, pp. 9, 16, 152, 153).

In this article, the chief focus is on ancient yahnusky of different regions of Ukraine (Kyiv region, Chernihiv region, Cherkasy region, Slobozhanshchyna, etc.), in which a wider audience of connoisseurs was interested.

In 2015, Maryna Bondarenko and Svitlana Zakharchenko from Pereyaslav-Khmelnitskyi published a scientific article “Women’s Folk Jewelry of Chernihiv Region in the Collection of the National Historical and Ethnographic Reserve “Pereyaslav” in the publication “Nizhynska Starovyna” (Bondarenko & Zakharchenko, 2015, pp. 23–27). The authors characterized the territorial belonging of the jewelry from the specified group of the specified reserve. And it was detailed that 70 units of them are dukachi (a special decoration, often with a bow), ducaty (mostly Austrian coins were strung on a thread together with beads, corals, etc.), lychmany (“crosswords”). At the same time, 33 units of the specified museum group originate from Poltava region, 22 from Cherkasy region, 8 from Pereyaslav region in Kyiv region, and 7 from Chernihiv region. And they explained that the dukach in the ensemble of breast jewelry was a “central figure” of the ensemble of jewelry (Bondarenko & Zakharchenko, 2015, p. 27).

The majority of the objects of this group were made in the technique of casting and minting in silver with gilding. On the “Queen” type of products, the reverse side of the medallion sometimes had the “Annunciation”, “Angel with a Flower in Hand”, and “Dove between Clouds” subjects. At the same time, the scholars recorded that similar products were sold in Nizhyn region up till 1918 (Bondarenko & Zakharchenko, 2015, pp. 23–27).

Some of the bows were decorated, in addition to stones made of red glass, with faience inserts with an enamel painting with a golden flower on a blue background, mounted in “casting” cells. The author distinguished a product, among Chernihiv dukachi of a lychman type, made of a token with the image of St. Theodosius Uhlytskyi, Archbishop of Chernihiv in 1896 and the inscription “Chernihiv Cathedral”. The images of St. Kateryna, St. Varvara, St. Elyzaveta, St. Paraskeva were considered to be “amulets/protective” (Bondarenko & Zakharchenko, 2015, pp. 23–27). However, in fact, yahnusky were not singled out until the middle of the 2020s, among such decorations.

In 2017 – 2019, Candidate of Historical Sciences Yaroslava Kovalenko, who worked at Bohdan Khmelnytsky Cherkasy State National University and Cherkasy Local History Museum, joined the study of the latter in several short researchers. Her publications “Dukachi of Ukraine” (Kovalenko, 2019b), “Dukachi of the South-Eastern Slobozhanshchyna” (Kovalenko, 2019a) and “Yahnusok – Dukach with Heart” (Kovalenko, 2017) posed the question of studying this part of the national jewelry heritage under the prism of a new wave of interest in authentic jewelry. In addition, Yaroslava Kovalenko, in fact, introduced the very term “yahnusky” into domestic scientific circulation.

In 2018, Candidate of Historical Sciences, Ethnologist Oksana Kosmina decided to deal with the issue of preparing dictionary articles on the Ukrainian traditional jewelry. The author, in her publication, which was called: “Names of Ornaments of the 11th – 18th Centuries (Materials for Terminological Dictionary)”, published in the “National History Notebooks” (Kosmina, 2018, pp. 237–238), relied on the publications of Lviv linguists – a valid member of the National Academy of Sciences, Candidate of Philological Sciences H. Hrynchyshyn, Doctors of Philological Sciences L. Humetska and Ya. Zakrevska in 1985,

which was also published in Kyiv publishing house “Naukova Dumka” under the title “The Ukrainian Historical and Dialectical Lexicon” (Hrynchyshyn, Humetska & Zakrevska, 1985, p. 41).

The scientific article of 2019 written by Olha Frasyuniuk, Candidate of Historical Sciences “Dukach – traditional decoration of Ukrainian woman of the 17th – the Beginning of the 20th Centuries” was the next most important in terms of the study issue based on the materials of the exhibition “The Sun on Necklace. Dukach” in Issue 4 of the Scientific Bulletin of the National Museum of the History of Ukraine (Frasyniuk, 2019, pp. 524–540).

The author, who then worked as a leading researcher at Museum of Historical Jewels of Ukraine, a branch of NMIU, and now holds the position of Deputy Director for scientific work of the National Museum of the Ukrainian Folk Decorative Art, devoted her attention to two collections, the works of which were then exhibited at NMIU – Kyiv one from NMIU, which has about 100 dukachi, and Pereiaslavsk (then 26 exhibits out of seventy were involved).

**The purpose** of the research is to analyse the original heart-shaped female “yahnusky” in the form of dukach, widespread in the ensemble of traditional women’s clothing of the 17th – at the beginning of the 20th centuries in the Northern, Central, and Eastern parts of Ukraine, which now returned to the national fashion in the form of “replica reconstructions”.

**The Results of the Research.** In general, it should be noted that the definition of “yahnusok”, “ahnusok”, derived from Agnus Dei, is close to the Old Polish term “Agnušek”, (which means, in addition to “Lamb of God”, a variant of the wax lamb consecrated by the Pope, which had the qualities of a talisman against all kinds of calamity and disaster) (Hrynchyshyn, Humetska & Zakrevska, 1985, p. 41; Kovalenko, 2017).

It is believed that initially such jewelry was made of wax in the form of a medallion with the image of the Lamb, which was depicted on the reverse, and John the Baptist on the obverse. Since antiquity, a heart wrapped in ivy became a symbol of strong love and affection (Kovalenko, 18.03.2019).

Since the Early Middle Ages, there were found paired hearts, as connected pendants, on the wedding belts of the Byzantine Emperors and the representatives of the establishment. Hence, a renowned fragment of such an initiation belt of the end of the 6th – beginning of the 7th centuries, made of gold, is now kept in the Dumbarton Oaks collection, Washington (USA) (**Fig. 1**). (Bosselmann-Ruickbie, 2011, pp. 1–320). It depicts the newlyweds with Jesus, who joins them in the symbolic ritual part of the Roman rite “dextrarum iunctio”, when young people took each other’s right hand (used from the 4th century AD actively)

Then, in fact, the parts of the medallions with the image of a couple getting married under the highest spiritual auspices had connected wedding rings and attached heart rings symbolically.

During the Middle Ages, the cult of the Sacred Heart of Jesus Christ, known among Christians of the Western rite since the 11th century (first of all, among the followers of Jesuitism), became especially widespread in Europe. From that time, separate religious buildings began to be erected in honour of the Most Holy (Most Pure) Heart of Jesus Christ (a well-known example is in the village of Bene in the present-day Berehiv district in Transcarpathia, in the 14th century).

The hearts began to be introduced into decorations and items of church use from the days of Kyivan Rus. They became a symbol of the “pure heart” of a Christian. During the Renaissance, hearts are found as pendants, decorated with red and white floral patterns, in the art of Tudor England. In particular, there is an example of a heart-shaped product, similar



to the Ukrainian yahnusky, with a decorative ornament with font elements, which record the union of King Henry VIII and his wife Catherine of Aragon in the marriage of the beginning of the 16th century (collection of the National Museum of Great Britain) (**Fig. 2**).

The identified work is quite large and weighs 300 grams. On one side, it is decorated with the Tudor rose entwining a pomegranate bush (a symbolic combination of the feminine and masculine). On the other side, the initials of the names Henry and Catherine are intertwined. At the same time, the composition is decorated with inscriptions from the letters TOVS + IORS, which form a pun in relation to the French word “*toujours*”, i.e. “*always*” (Kozyr, 2023). It should be noted that the transition in the European worldview of the post-Gothic era to more sensitive images replaced the scholasticism and ascetic aesthetics of Byzantium of the previous era.

It is widely known that from the 13th century ducat coins began to be produced in Venice, from the 14th century in Hungary, as well as Austria and Germany. The Germans (11 people) were the largest number of Lviv goldsmiths in the 15th century (Petrenko, 1970, pp. 23–24). They, obviously, developed the tradition of making dukach thalers and spread it first in the western Ukrainian territories, and later in the eastern Ukrainian ones. After all, according to official documents published by the researcher of domestic goldsmithing M. Petrenko in 1970, it is known about the existence of a goldsmith shop in Kyiv at the beginning of the 16th century, where the cultural centre of Ukraine moved a century later (Petrenko, 1970, p. 24). At the same time, a separate guild of goldsmiths was recorded in Lviv only in 1600 (Petrenko, 1970, p. 24).

Pope Urban V became the inspiration for wearing similar charms-amulets from the end of the 16th century (initiative of 1594). The name “*ohnusok*” was used by the Slavs for decorations-medals that did not feature images of a lamb already from the 17th century (Kosmina, 2018, p. 237) (**Fig. 3**).

In this sense, the elements of ceremonial costumes of representatives of various social strata of the population, in particular the western lands of ethnic Ukraine, which developed for a long time in symbiosis with the Polish tradition of dressing (Biedrońska-Słota & Molenda, 2019, pp. 113–136), considering that Lviv was the second crown city, taking into account the dominant Catholicism here, should record the local culture of the use of dukachi (Turnau, 1999, p. 11) in everyday (Tarasyuk, 2021, pp. 9–27) times of the Polish-Lithuanian Commonwealth.

However, neither in Halychyna nor in Volyn (Shevchuk & Markevitch, 2022, pp. 9–25), during the Baroque period, there are no references to the varieties of wearing yahnusky from among the dukachi. Although the logic of the sources of borrowing suggests that the fashion for such works in the ensemble of women’s costumes could have come to Ukraine precisely from Western territories, where great importance was attached to the image of “*virtuous*” and “*worthy*” representatives of the establishment, “*ideal kings*” and their entourage (Znak, 2022, pp. 1–18), decent matrons. Moreover, ancient jewelry of the specified type was often ordered by men in that period of time not only for their wives, but also for the veneration of icons, which is recorded in separate documents.

Hence, according to the materials of the newspaper “*The Kyiv Telegraph*”, which quoted ancient primary sources, sotnyk Hryhoriy Harkusha gave an order to take away church utensils from priest Kornyliy, who served in the St. Michael’s Church in Boryspol (Borishpol) already on January 21, 1663. The property included “*yahnysok of eden; coral bead*”. The above-mentioned information could be the vivid example that there was spread of

such ornaments among the inhabitants of Kyiv region as early as the second half of the 17th century (Dopomozhemo istorykam, 2007). Although, according to the data of specialized historical research in the specified area, which is dedicated to the chronicles of Kyiv, and not of Kyiv region of the 14th – 17th centuries, such references are not recorded (Rusina, 2021, pp. 192–193).

From 1765, the holiday in honour of the consecration of the Sacred Heart of Jesus Christ was officially approved by Pope Clement XIII, after which individual Christian communities began to honour it especially (in 1787, a church of the same name was built in Kherson). Since 1856, this holiday had become a general church holiday (Kovalenko, 2019a). During this period, the traditions of wearing a pendant with a medallion, sometimes in the shape of a heart, borrowed from Germany and Austria-Hungary, spread to the territories of certain regions of Ukraine. As a result, they were often combined with the image of the cross and other protective Christian symbols in Ukraine.

More often, the image of the Mother of God or Jesus Christ, including his Crucifixion, or a monogram was depicted on the hearts of yahnuskiv. In Ukrainian families the shape of the product was often preserved from generation to generation, because jewelers tried to strictly adhere to it when reproducing. This caused the crystallization of the traditions of making certain types of yahnusky in certain local centres and the specifics of “sealing” fashion for such products that left a mark in certain families (Kovalenko, 2019a).

Incidentally, it should be noted that according to the Scriptures, the actual “Lamb” is the symbolic name of Jesus Christ, as well as the name of part of the first proscomedian proscura (prospora), which represents the “flesh” of the Savior in the rite of the Liturgy for the Eucharist (the transformation of wine and bread into Body and Blood Our Lord at the time of accepting Him into your heart). A one-year-old lamb, which the Jews used to “slaughter”, was called a lamb from a long time ago. It was sacrificed by the Jews during Pesach (Easter holidays) and was sacred (Belei & Belei, 2001, p. 12).

If we delve deeper into the meaning of the specified nomen, according to the “Dictionary of Church and Ritual Terminology” by Natalia Puryaeva, the Lamb is synonymous with the concept of “Holy Bread” (Eucharistic Lamb or Liturgical Lamb) and is a symbolic image of the anaphora (Eucharistic canon) – part of the Liturgy of the faithful, when reincarnation takes place and elevation of the Holy Gifts (Puryaeva, 2001, pp. 21–137), and it represents one of the main Symbols of Faith.

The ornament, the name of which was associated with the Holy Gifts, became widespread in Ukraine from the Baroque era. It proves its close connection with the Catholic tradition of Western Europe, where the cult of the heart was respected (Spaskyi, 1970, p. 38). It is believed that it was derived from the fashion among the nobility of the Grand Duchy of Lithuania, within which the old Ukrainian culture was nurtured. After all, the presence of similar ornaments in domestic circulation from the 17th century is clearly recorded.

At first, such works were copied from Central European pioneers. In particular, with charivari – a traditional male decoration of the mountaineers of Austria, Bavaria, Switzerland, which looked like a row with suspended amulets (initially – a horn, tufts of wool, a pipe, then a medallion or a coin, etc.). Often the medallion was decorated with silver, rock crystal, amber (Linde, 1807, p. 11).

According to primary sources, O. Kosmina put down the following records about jewelry of this type: “In Ukrainian sources, the term A. appears from the 17th century (“yahnusek, silver gilded”, “silver yahnusek”) and continues to exist in the 18th century (“ahnusok silver

gilded”, “yahnusok with a stone, sealed in a gun [in a box. – O.K.]”, “ohnusok silver in thirty kopiks, and ohnushok pure gold with one and a half red coins cast in eighty kopiks”)” (Kosmina, 2018, p. 258).

And then the scholar continues: “The material from which this decoration was made could be very diverse: from wood, stone, horn to silver: “3 wooden ahnusiky, 23 smaller ahnusyky of various horns that monks make”. Ahnusok was worn as a separate ornament or in an ensemble with a necklace: “a row of pearls with paciorkami mixed, on those pearls, 1 ahnusok, a row of corals and a yahnusok”, “other pearls, with a small yahnusok”” (Kosmina, 2018, p. 258).

The given list of quotations indicates a special spread of the tradition of wearing yahnusky (ahnuskiv, ednusiv, ahnusyk, yaknusik, ohnusik, etc.) (Kosmina, 2018, p. 257) in the 17th–18th centuries (according to information from ancient acts of the lands of ethnic Ukraine in the composition of the Ukrainian Central Government 1654 – 1667, legal documents and certificates, as well as information about the life of the Ukrainians of the 18th century, Polish dictionaries of the very beginning of the 19th century by S. Linde, etc. (Linde, 1807, p. 7) and their combination in the ensemble of the Ukrainian costume with the Venetian beads (painted beads), pearls (pearls), corals, when made of alabaster, horn, wood, silver (**Fig. 4**).

At the same time, according to the data from the “Notes of the T. Shevchenko Scientific Society”, published in Lviv in 1914 (vol. 117–118), the spread of the tradition of wearing yahnusky instead of crosses in the 17th–18th centuries among representatives of the nobility was connected with the imitation of the fashion for combining Western European costume and corresponding jewelry of that time. In this regard, it was noted that some people, who could afford to wear consecrated lambs “are ashamed to wear the crosses of the Cross and instead wear some lambs with wax” (Hrynychshyn, Humetska & Zakrevska, 1985, p. 41). That is, the ascetic cross did not fit well with the hedonistic European costume of the given era with its playful character of frivolous pretensions in the costume of the times of gallant scenes and love for theatrical effects.

Taking into consideration the design of yahnuskiv, the flaps of which could be opened, it can be assumed that inside the heart there could be talismanic Symbols of Faith, hidden from the eyes of others, following the examples of censers derived from the Byzantine jewelry art. But most often hidden from prying eyes, such elements were hung as a medallion under an elegant bow, which defined the ensemble of a representative accessory, which fit into the Baroque and Rococo styles (17th – 18th centuries) clearly.

The Baroque period in Ukraine coincided with the period when our lands first became part of the Grand Duchy of Lithuania, in which there were extremely close relations with Italy (the fashion for chicisbey escorts accompanied by women, even married ones) and France (pastoral scenes, a game of unequal love), and later also the Commonwealth of Nations, when the Polish kings were twice Austrian electors at the same time in the 18th century. The last circumstance connected the circles of the Ukrainian and the Polish establishment with the Austrian, German, Hungarian, and the Czech traditions of nobility, which affected fashion trends and the specifics of understanding the perfect ensemble of a suit (Shkolna & Tymoshenko, 2023, pp. 8–29).

After the three repartitions of Poland, a large number of victorious elements of ancient traditions, together with kuntushevymy outfits, which were perceived by the Poles as the national clothes of the Commonwealth of Nations, became associated with certain objects. In particular, accessories in a woman’s costume, which gave a reference to ancient, glorious eras, when honour, decency, and dignity were valued. Due to the union, a significant number

of Catholic traditions were borrowed by the free people of Western Ukraine first, and later of Eastern Ukraine. First of all, its parts of Naddniprianska and Slobozhanshchyna regions, including the lands of Voronezh region, where more than 1,000 families of the Ukrainians lived, and which came into vogue for various strata of the population gradually, and Kursk region, where the Ukrainians accounted for more than 22% at the end of the 19th century. Among the dukachi of Voronezh region, silver yahnusky of the 19th century are known first of all (**Fig. 5**) depicting the plot of the “Last Supper” (Frasyniuk, 2019, p. 535).

The golden yednusy (i.e. yahnusky) were also mentioned in other works. In particular, Slobozhansky writer H. Kvitka-Osnovyanenko of the first half of the 19th century. It indicated that in the 19th century the Venetian and other European silver and gold coins, which were in common use and sometimes became part of jewelry as dukach, were often understood as dukach.

For the most part, it was spread in the female circles of the Hetman’s foremen and in baroque festive women’s outfits. The tradition of wearing yahnusky remained mostly in Slobozhanshchyna and Poltavashchyna at the end of the 18th – at the beginning of the 19th century. At the same time, typical local features of jewelry were formed among jewelers. Hence, Nizhyn, Chernihiv, Veremiyiv, and Lubny varieties are distinguished from the dukachiv (Ukrainske zolotarstvo, 2014) (**Fig. 6, 7**).

It should be noted that in the fourth volume of the “Dictionary of the Ukrainian Language” edited by Borys Hrinchenko, published in Kyiv in 1909, on page 535 the term “yahnusyk” (masculine) was mentioned incidentally. The author-compiler pointed out that at the beginning of the 20th century, the Ukrainians understood this term as “a long necklace with dukachi” and that the term was apparently synonymous with “yednus”. At the same time, the last name was painted by the scholar in Volume 2, on p. 467. It was stated: “= Dukach” and a quote was given, owing to which you can learn more about the purpose of the object: “On top of such a neck, on a black velvet, wide, fingers maybe two, a gold yednus, and in the ring on top is a small red stone” (Hrinchenko, 1907 – 1909, p. 467).

A characteristic example originating from Poltava region was a silver and gilded dukach “yahnusok” inv. No. DM-4871 from the collection of the Treasury of the National Museum of the History of Ukraine. It has the appearance of a whimsical flower with a red stone in the centre of an oval shape, which grows into a bow with notches and five inserts of coloured glasses (four on the sides and one in the center of the conventional Star of Bethlehem at the top), and a pendant in the form of a heart, which ends at the edge decorative balls – grain imitation. The product dates back to the end of the 18th and the beginning of the 19th centuries (Frasyniuk, 2019, pp. 535–540) (**Fig. 8, 9, 10**). The domestic goldsmiths repeated the above-mentioned jewelry most often two centuries later.

After all, since the days of Ukraine’s independence, heart-shaped yahnusky (a Christian symbol of hope and God’s love) and wedding yahnusky with bows (**Fig. 11**) entered again the fashion of the domestic jewelry. Sometimes they look like a heart topped with a ribbon bow in the form of a symbolic crown with double birds, and became a symbol of eternal love and typical exclusive gifts (compliments, declaration attributes) for Valentine’s Day.

A typical example is the products of several Ukrainian workshops, which began to master the specified assortment at the end of the 2010s – at the beginning of the 2020s, including images of the Mother of God. After the publication in 2014 by the Institute of Collecting Ukrainian Art Monuments at the T. Shevchenko Scientific Society in the city of Lviv, where on pages 152 and 153 yahnusky were presented, the fashion for similar ornaments/jewelry, revived for the newest Ukrainian outfit, gained rapid popularity (Ukrainske zolotarstvo, 2014, pp. 152–153).

Hence, there are examples of such works on the columns of the worldwide Internet, which are represented by users and authors of works. In particular, yahnusky from the “Zolotar” brands (masters Vladyslav Lyulin (**Fig. 12**), Yuriy Kovalenko, Vasyl Bilonozhko, a restorer Mykola Lytvynenko) of 2018 (silver, gilding), Oleksandr Paslavsky (silver with zirconium) (**Fig. 13**) were presented and a performer Tetiana Chorna, 2019, Atelier Skifska-Etnika (BilaTserkva) in Kyiv region – a tandem of Oleksandr Dziubenko and Olesia Bezpechna, 2018 – 2023 (jewellery metal “zamak” with silver plating, silver, gilding) (**Fig. 14–15**).

Also, at the end of the 2010s and at the end of 2020s, non-silver and cupric jewelry from the specified range of products can be found. Valentyn Kikot’ (2018, silver) is well-known among the master jewelers, who took part in the reproduction of historical yahnusky within the legacy of the Jewish workshops of Volyn, in particular in the filigree technique (2018, silver) (Kovalenko, 2018) (**Fig. 16–21a**). Sometimes higher-quality “reconstructions” are imitated by less skilled masters, quoting the originals almost verbatim, but not in hand engraving, but in Lithuanian.

**The Conclusion.** Hence, yahnusky (ahnusky) were worn mainly in Central and Eastern Ukraine (Kyiv region, Poltava region, Cherkasy region, Chernihiv region, Sumy region, Kharkiv region, in the Ukrainians settlements in Slobidskykh Voronezh region and Kursk region) from the 17th century, initially from among the circles of the establishment, in which it was customary to wear suit as it was in fashion in other European countries. Especially those countries, where fashion originated from.

Moreover, in terms of aesthetics, reception of such ancient jewelry in Ukraine from the 17th – 18th centuries should be connected with post-antique sources of inspiration, in particular, widespread from the Middle Ages (Byzantium and England). In turn, they contributed to the spread of the fashion for large heart pendants with bows, which fit better into the ensemble of baroque and rococo costumes, especially the French hem, in the style of dresses *a la Marquise de Pompadour*, etc., than the cross.

In this sense, the ornament/jewelry, which demonstrated the idea of hope and a pure Christian heart filled with “God’s love”, consisting of two flaps (in the middle of which you could put incense, talisman incense), attached to a coloured ribbon like a choker, completely fit into the idea readiness for devoted service. And that is why, it was especially valued in the circles of the nobility during the period of fashion for courtly relations.

The appearance of such monuments was both elegant and pompous. Especially when the ornate *darmovys-dukach* had the shape of a heart, which corresponded with the *flambeaux* (heart pierced by an arrow) motifs typical of the given time period in ornamentation. A representative bow on top of the jewelry ensemble complemented the feeling of femininity from the whole image. At the same time, the colour of the ribbon could be matched to the tone of the accessories and, if necessary, changed, which made it possible to experiment with a moody colour range and refresh the “tonality” of the entire outfit.

It should be noted that the first replicas of the 17th century from Western European analogues were among those yahnusky that survived to our time. They had the appearance of *dukachi* medallions, on which a heart was sometimes depicted. The fashion for adorning oneself with money (coins) clearly also was of an oriental character during this time period. After all, close relations with the Crimean Khanate, later the phenomenon of the Khanate Hetmanate; local lands that belonged to Turkey for a certain time on the territory of ethnic Ukraine, as well as active diplomatic relations with Constantinople-Istanbul caused a certain assimilation of traditions.



Hence, borrowings are noticeable from hints and re-marks in women's outfits, to the rustling of coins, which decorated headdresses and the collar-chest area since ancient times, based on the traditions of the Scythians, the Sarmatians, the Alans, and the Polovtsy women, in whose estates Kievan kniazi (princes) were still raised; the Georgians, the Byzantines, the Crimean Tatars, the Turks, etc.

In this sense, yahnusky became part of the unique Ukrainian authenticity gradually, which reached its greatest flowering in the Baroque era, when domestic ornamental art, as well as jewelry, enriched by the fashion for the Sarmatian myth, were at the same time exposed to oriental influences associated with the splendor of the patterns of oriental fabrics, and reflections of overloaded late European mannerism.

The following names of prominent jewelers stand out among the masters of Cherkasy region of the end of the 20th and at the beginning of the 21st centuries: Volodymyr and his son Vladyslav Liulinykh, Yuriy Kovalenko, Oleksandr Paslavsky (Zvenyhorodka), Vasylyl Bilonozhok, Valentyn Kikot, a restorer Mykola Lytvynenko. It was the tandem of Oleksandr Dziubenko and Olesia Bezpechna (Bila Tserkva) – Atelier Skifska-Etnika in Kyiv region.

At the same time, traditionally, modern masters honour the ancient attributes of ancient yahnusky: the image of the tree of life on them is a symbol of prosperity, the Lamb represents the Holy Bread and the main Symbol of Faith, the flowers – the hope for growth, fertility, and the intertwining of male and female nature, turtledoves/doves – the Holy Spirit, the talisman of a strong link between generations, procreation and happiness in the family, the heart is God's Love and a Pure Heart, open to faith. A towel is an attribute of a wedding ceremony, the symbolic star of Bethlehem is a signpost of a clean, righteous life.

The Prospects for further research should be associated with the identification of the author's handwriting of master jewelers, who made ancient yahnusky in the lands of ethnic Ukraine from the end of the 17th to the beginning of the 20th centuries and the reattribution of the renowned museum works.

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## ILLUSTRATIONS



**Fig. 1. Fragment of Byzantine marriage belt of the VI-VIIIth centuries with connected free-hanging hearts. Coll. Dumbarton Oaks, Washington (USA). Photo from the site: <http://museum.doaks.org/objects-1/info/27445>**



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**Fig. 6. Dukach with hearts. Made on the basis of the thaler of 1782 “Patrona-Bavariae”. The reconstruction of the “Research Centre for the Revival of Volyn”, the town of Radyvyliv, Rivne region. Silver, gilding. Photo from the site: <https://day.kyiv.ua/article/den-ukrayiny/dukachi-z-mynulykh-stolit>**



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**IVAN BARTOSHEVSKY (1852 – 1920), LVIV UNIVERSITY PROFESSOR:  
BIOGRAPHY AGAINST THE BACKGROUND OF THE TIME**

**Abstract.** *The purpose of the article is a comprehensive study of the biography of a priest, teacher, church figure, Professor at Lviv University Ivan Bartoshevsky, whose life path and professional activity fell on the second half of the 19th – the beginning of the 20th century, when in Galicia, as a typical region of the ethno-religious borderland, worldview values were transformed and educational and scientific processes rapidly evolved. The research methodology is based on general scientific and*

special scientific principles and methods, as well as the principles of historicism, verification, scientific pluralism, systematicity and consistency. **The scientific novelty** of the research consists in the fact that for the first time in the Ukrainian biography, the main stages of the life and professional activity of Ivan Bartoshevsky have been comprehensively covered against the background of ethno-religious, educational, socio-cultural processes in Galicia during the Austro-Hungarian era.

**The Conclusion.** Ivan Bartoshevsky was born in Lviv to a family of the Ukrainian burghers, and received his higher education and scientific degree in Theology in Vienna. After receiving ordination, he projects himself into versatile activity, including teaching High School Catechetics and University Pastoral Theology and Pedagogy, preaching activity, religious journalism, as well as an ecclesiastical career at Lviv Greek-Catholic Metropolis. The main vector of his activity was the training of future priests, and the means to achieve this goal were University theoretical and practical courses, homiletic seminars for students, as well as the publication of his own sermons in the Christian periodicals. Ivan Bartoshevsky accumulated his pedagogical experience in the first University manual on Pedagogy in the Ukrainian language, which was published twice at the turn of the 19th and 20th centuries, and became an important source of pedagogical and theological thought of the time. Due to the lack of a thorough research, certain pages of Ivan Bartoshevsky's biography remained insufficiently elucidated until nowadays. In particular, the fact of his paternity with the famous Polish essayist Jan Parandowski was proven, however, given the nuances of church law, Professor had no way to legitimize this fact.

**Key words:** education, University, catechetics, textbook, Greek Catholic Church, homiletics, religious periodical.

## ПРОФЕСОР ЛЬВІВСЬКОГО УНІВЕРСИТЕТУ ІВАН БАРТОШЕВСЬКИЙ (1852 – 1920): ЖИТТЄПИС НА ТЛІ ДОБИ

**Анотація.** Мета статті полягає у комплексному дослідженні біографії священника, педагога, церковного діяча, професора Львівського Університету Івана Бартошевського, життєвий шлях і професійна активність якого припали на другу половину XIX – початок XX ст., коли в Галичині як типовому регіоні етнорелігійного пограниччя трансформувалися світоглядні цінності та стрімко еволюціонували освітні і наукові процеси. **Методологія дослідження** ґрунтується на загальнонаукових та спеціально-наукових принципах і методах, а також принципах історизму, верифікації, наукового плюралізму, системності та послідовності. **Наукова новизна** дослідження полягає у тому, що вперше в українській біографістиці комплексно висвітлено основні етапи життя та професійної активності Івана Бартошевського на тлі етнорелігійних, освітніх, соціокультурних процесів у Галичині Австро-Угорської доби.

**Висновки.** Іван Бартошевський народився у Львові в родині українських міщан, а вищу освіту і науковий ступінь з теології здобув у Відні. Отримавши свячення він проектує себе на різносторонню активність, серед якої викладання гімназійної катехитики і університетської пасторальної теології та педагогіки, проповідницька діяльність, релігійна публіцистика, а також церковна кар'єра при Львівській греко-католицькій митрополії. Головним вектором його активності було навчання майбутніх священників, а засобами для досягнення цієї мети стали університетські теоретичні і практичні курси, гомілетичні семінари для студентів, а також публікації власних проповідей у християнській періодиці. Свій педагогічний досвід Іван Бартошевський акумулював у першому університетському посібнику з педагогіки українською мовою, який двічі видавався на межі XIX – XX століть, і став важливим джерелом педагогічної та богословської думки свого часу. Через брак ґрунтовних досліджень окремі сторінки біографії Івана Бартошевського досі залишалися недостатньо з'ясованими. Зокрема, доведено факт його батьківства щодо відомого польського есеїста Яна Парандовського, однак з огляду на нюанси церковного права узаконити цей факт професор не мав жодної змоги.

**Ключові слова:** освіта, університет, катехитика, навчальна книга, греко-католицька церква, гомілетика, релігійна періодика.

**The Problem Statement.** In 2022, 170 years passed since the birth of Ivan Bartoshevsky, the Ukrainian pedagogue, a theologian and writer, a lecturer at Lviv University. His life, creative



and professional activity fell on a day of large-scale worldview transformations, complex and far-reaching processes in socio-cultural, ethno-religious, educational, scientific and other spheres, when important paradigms changed, intercultural contradictions intensified, and national worldview principles crystallized. We dare to say that Professor's biography, scientific and pedagogical legacy have already awaited an inquisitive look of a modern researcher.

Ivan Bartoshevsky was a well-known figure in the intellectual environment of Lviv at the end of the 19th and the beginning of the 20th centuries. His authority was promoted by his active involvement in organizational affairs at the Greek-Catholic Metropolis, numerous publications of the author's sermons and scientific texts, but first of all the status of Professor at Lviv University. We will try to follow the life path of Ivan Bartoshevsky against the background of social, educational and academic processes of the second half of the 19th – the beginning of the 20th century.

**The Analysis of Recent Research and Publications.** The figure of Ivan Bartoshevsky was not often in the research focus. Some aspects of his biography were clarified in the works by Ya. Hlystiuk (2011), H. Matviyenko (2012) and H. Pavliak (2018). Instead, at the end of the 19th and the beginning of the 20th centuries the Ukrainian educational and pedagogical environment was studied in general and regionally by L. Sholohon (Sholohon, 2021), O. Shapoval (Shapoval, 2020), N. Fedchyshyn, T. Mahsumov (Fedchyshyn & Mahsumov, 2019), I. Anosov, M. Elkin, M. Holovkova, A. Korobchenko, M. Oksa (Anosov, Elkin, Holovkova, Korobchenko & Oksa 2015), A. Pavko (Pavko, 2008), I. Kurliak (Kurliak, 2000) and the others. The monographs by D. Hertsiuk, T. Leschak (Hertsiuk & Leschak 2022), and V. Kachmar (Kachmar, 2021) stand out among the most recent studies of the history of Lviv University. The social activity of the Christian clergy at that time was studied, in particular, by I. Antoniuk, M. Mudry (Antoniuk & Mudry, 2012) and N. Semerhei (Semerhei, 2020).

**The purpose of the study:** on the basis of source documents and verified facts, to study, systematize and summarize the various elements of the biography and activity of Ivan Bartoshevsky against the background of the time comprehensively, as well as to single out the key periods of his life and clarify the vectors of a professional activity reasonably.

**The Results of the Research.** Ivan Bartoshevsky was born on January 18, 1852 in Lviv to the family of the Ukrainian burghers Hryhoriy (1812 – 1898) and Maria (1819 – 1908) Bartoshevsky (Hlystiuk & Leshchak, 2011, p. 183). According to demographic statistics, in the middle of the 19th century, about 60.000 people lived in Lviv, of whom 56% were the Poles, 36% – the Jews and only 7% – the Ukrainians (Lozynskyi, 2005, pp. 128–129). It should be noted that until the middle of the 19th century, the ethnic self-identification of the Ukrainians was quite low in Lviv. In an everyday life, they mostly used the Polish language, and only after the events of the “Spring of Nations” did the Galician Ruthenians return to their native language. The tone in these processes was set by the intelligentsia, which consisted mainly of the Greek-Catholic clergy (Tarnavskyi, 1981; Semerhei, 2020; Shapoval, 2020).

To get an elementary education, the Bartoshevskys sent Ivan to St. Elizabeth school of (Matviienko, 2012, p. 107), and after its finishing, they were faced with a choice. In Austria at the time, the transition from primary to main education meant making a fundamental choice – a university or a vocational school. A classical gymnasium prepared for the first, and a real school – for the second. Ivan's parents were optimistic about their son's educational prospects and sent him to the Academic Gymnasium.

The boy's childhood and adolescence fell on the first post-revolutionary decade, which was affected by rather controversial social processes in the region. The Austrian authorities,



after taming the revolutionary activity of their citizens, demonstrated their intention to limit democratic rights and freedoms for a certain time. At the same time, the demonstrative support of the leading Ruthenian politicians to the Viennese government prompted it to take symmetrical steps towards it. The land on the site of the University destroyed during the revolution (nowadays – 22 Teatralna Street) was given to Lviv Ruthenians for the construction of the People's House. The Academic Gymnasium was also moved there in 1864, which until 1888 remained the only secondary school in Galicia with the Ruthenian (Ukrainian) language of instruction (Melnik). Taking into account the time of Ivan Bartoshevsky's education, this is where he attended daily school classes, and this is where he received his full secondary education (Matviienko, 2012, p. 107). Apparently, the information of the Polish researcher Grazyna Pawlak that Ivan Bartoshevsky went to the Ukrainian gymnasium in Akademichna Street, 1 (nowadays – Shevchenko Avenue) (Pawlak, 2018, p. 148) should be considered false, considering at least the fact that no educational institution has ever operated in this building, and at the specified time Galicia Mortgage Bank was located there (Biriulov, Cherkes, Bevz, Rudnytskii, 2008, p. 316).

For a long time, the Lviv Academic Gymnasium became an educational centre for the Ukrainians, from which the future intellectual elite of the region emerged. For a complete understanding of the Galician cultural and educational panorama of the 1860s, it should be taken into account that the People's House, the Galician-Ruska Mattysia, the Stavropygian Institute and other leading centres of the social life of the Galician Ruthenians at the specified time were in the hands of Muscophile activists (Orlevych, 2007). They became the exponents of the imaginary idea of a linguistic unity with the Russian people through the creation of a special artificial language – the so-called yazychiye.

Yazychiye combined Church Slavonic and Russian grammatical constructions with admixtures of the Ukrainian and Polish vocabulary, and were pronounced in the Ukrainian pronunciation (Steblii, 2013, p. 725). Naturally, the students of the Academic Gymnasium learned this language as a means of intellectual communication in the public space. It was in this language that during the last third of the 19th century, the majority of scientific, liturgical, and even journalistic texts were published. A gradual growth of the narodovtsi influence on the social life of the region contributed to the expansion of the presence of the national Ukrainian language in the public space of Galicia (Steblii, 1996). Ivan Bartoshevsky also went through all the stages of this evolution together with the intellectual elite of Galician Ukrainians, in particular with the Greek-Catholic clergy.

From the beginning of the 1860s, the Austrian authorities initiated the process of the autonomy of Galicia, the result of which was the actual establishment of the Polish national and territorial autonomy in the region (Uska, 2017). Over the next twenty years, Polish replaced German in official administration and education. In 1871, by a special imperial decree, Lviv University became Utraquist (bilingual – Polish-Ukrainian), which eventually gave preference to the Polish departments over the Ukrainian ones (Sholokhon, 2021). Only at the Theological Faculty, the language of instruction was Latin, with occasional elements of German, Polish, and Ruthenian (Ukrainian) (Mudryi, 1999, pp. 45–47). Ivan Bartoshevsky probably planned his future at Lviv University, but at the time his attention was drawn to a more promising option from the point of view of the quality of education.

The Central Greek-Catholic Theological Seminary (the so-called “second Barbareum”) had been operating in Vienna since 1852. This educational institution positioned itself as the heir of the ancient Barbareum, founded by Empress Maria Theresa in 1774. The Seminary

performed the functions of a higher spiritual educational institution for the training of Greek Catholic clergy from among the citizens of Austria. Graduates of the Barbareum could apply for church positions in their homeland, so young men who planned to devote themselves to an ecclesiastical career usually entered it. Studying there from 1871 to 1874, Ivan Bartoshevsky, together with other Ukrainian students from Galicia and Transcarpathia, joined the world's cultural and spiritual heritage, deepened his theological knowledge, and got acquainted with the history, literature, and art of European nations (Steblii, 2003). In addition, Ivan Bartoshevsky attended the Slavonic course of Professor Franjo Miklošych at the University of Vienna (Hlystiuk & Leshchak, 2011).

The next important step in the life of Ivan Bartoshevsky was priestly ordination, which he approached in 1875. At that time, young Galician priests planning to serve in the parish usually took care of starting a family before ordination. The canon law of the Eastern Catholic Churches traditionally allowed a priest to be married, but marriage could only take place before ordination (Codex Canonum, 1990). Unmarried, educated priests, in turn, projected themselves into a church career. As Mykola Shlemkevych, a researcher of the mental culture of that time, aptly noted, moving up the social hierarchy was “a legitimate dream of every capable and ambitious Ukrainian. For theologians, its realization was the title of Krioloshanyn or court adviser in this world, and the Kingdom of Heaven in the next ...” (Shlemkevych, 1956, pp. 44–45).

Ivan Bartoshevsky was ordained at the age of 23, remaining unmarried, and this forever closed the possibility of marriage to him. Studying in the Barbareum and receiving the priesthood in this status testify to a firm intention to devote oneself to a church career, and not to service in the parish. We have no reason to interpret this act as rash, but in the future Fr. Ivan Bartoshevsky will have at least one reason to doubt his choice.

Meanwhile, the return to Lviv gave rise to the young priest's professional growth in several directions at once. In 1876, he received his first pedagogical and pastoral experience as a catechist at the Lviv Higher Real School and a deputy pastor at the Cathedral of St. George. At the same time, his painstaking work on the scientific study “*De infallibilitate Romani pontificis*” (“On the infallibility of the Roman Pontiff”) continued. In 1877, Ivan Bartoshevsky again went to Vienna, but this time only in order to go through the public defense procedure and obtain the scientific degree of Doctor of Theology (Hlystiuk, Leshchak, 2011). Such an achievement opened the way to teaching in higher education, but this path still had to go through serious competition.

Since its appearance in the educational field of Galicia, Lviv University had always been accepted by the public as a centre of intelligence, education, and scientific thought. A person's membership in this institution automatically gave him a certain special status in society, and this status presupposed the presence of a high cultural level of the individual, outstanding moral and ethical qualities, and encouraged the corresponding model of behaviour in society. The University teacher acquired involvement in the intellectual elite, which enjoyed reputational bonuses, but also bore the burden of moral responsibility for the worldview influence on its communication environment.

At the same time, the atmosphere of University life during the 19th century was characterized by a remarkable dynamic of internal processes, so when talking about the academic environment of Lviv University, it is worth considering the peculiarities of the dynamics of internal processes in faculty communities and their correlation with current social phenomena in the relevant time periods (Holyk, 2013).

In 1879, Ivan Bartoshevsky received the position of an adjunct at the Theological Faculty. The formation of the academic career of a young theologian came at a time when Galicia rapidly got rid of the layering of Germanism, which was successively inflicted by the Austrian authorities during the previous century of rule in the region. Even then it became obvious to many that the Ukrainians were gradually losing the competition with the Poles to fill the University with their national content. This was manifested primarily in the fact that the existing German departments were transformed into the Polish ones, and new Ukrainian departments were not established. Galician Poles more and more convincingly received the University as a centre for the spread of the Polish science and culture, and the Ukrainians increasingly preferred the Lviv Polytechnic, the University of Krakow, and other higher educational institutions in Austria.

Elucidating the reasons for the mentioned above processes is beyond the scope of our research, however, it should be noted that in 1879 the Polish language became official at the University, and the number of the Ukrainians among its students continued to decrease. Thus, in 1855 they still made up 45% of all students of the Lviv University, in 1879 it was already 36%, and in 1894 – only 29%. The Theological Faculty, at which Ivan Bartoshevsky began to teach, retained the highest percentage of the Ukrainian students, namely 72%. For comparison, at the Faculties of Law and Philosophy they comprised only 21–22% (Program Wykładów, 1879).

The position of an adjunct (teaching assistant) usually served as a successful start to an academic career at the University. For a person with a Doctoral scientific degree, this position served as an intermediate stage on the way to the professorship, which Ivan Bartoshevsky received in 1884. It should be noted that professorships were awarded based on the status of the academic discipline being taught – obligatory (ordinary) or extraordinary (optional), and separately for each subject. Thus, the teacher could hold different professorships in different departments. Thus, in 1884, Ivan Bartoshevsky became an Extraordinary Professor of Pastoral Theology, in 1885, a Regular Professor at the same Department, and in 1890, a Regular Professor of Pedagogy (Finkel & Starzyński, 1894, pp. 184–185). As a matter of fact, Professor personified the Department, as he conducted a lecture course and practical classes. Some lecturers had assistants (substitutes), but this was rather an exception to the rules (Pavko, 2008).

Ivan Bartoshevsky's first department was Pastoral Theology. During the study of this educational course, students of Theology got acquainted with the theory and practice of a priestly activity (Matviienko, 2012, pp. 105–110). One of the bright representatives of the Galician intelligentsia of that time, Fr. Filimon Tarnawski, who studied at the Theological Faculty in the 1980s, left short emotional memories of his lectures. Taking into consideration the value of the memoir and the subjectivity of the author's evaluations, we will quote them in full: "Pastoral Theology was taught by Fr. Dr. Ivan Bartoshevsky (1852 – 1921) (*the authors* – This is a factual error: he died in 1920). It was the most interesting subject. Professor Bartoshevsky taught well, but used very crude examples and overly crude jokes. He was lenient at exams. Students loved him. He was a Ruthenian, he taught in Ruthenian" (Tarnavskiy, 1981, p. 115).

In 1890, Ivan Bartoshevsky took over the teaching of a new educational course – Pedagogy. His listeners were students of Theology projecting their professional future on Greek-Catholic pastoral activity. At that time, Pedagogy was taught separately for the Ukrainian students of the Greek Catholic faith and Polish students of the Roman Catholic faith. Such linguistic and

religious division took place in 1886, when multilingual educational courses appeared in the curricula. Professor Yosyf Delkevych (1822 – 1912) was the first one to teach Pedagogy in Ukrainian, and when he retired, his lectures were taken over by Ivan Bartoshevsky.

It was at this time that Professor Bartoshevsky's authority grew in the academic and church environment of Lviv, as evidenced by many facts. Thus, at the Theological Faculty of Lviv University, he was elected to administrative positions many times, namely, Dean (in 1888 and 1893) and Vice Dean (in 1889, 1891, 1894, 1895 and 1896) (Hertsjuk, Leshchak, 2022, pp. 202–203). Since the beginning of the 1890s, Fr. Ivan Bartoshevsky had been involved in the performance of increasingly responsible duties under the Lviv Metropolitan Government of the Greek Catholic Church. Since 1891 he had been an active adviser and referent of the Metropolitan Consistory, since 1895 he had been an honorary canon of the Metropolitan Chapter, and since 1897 he had been an adviser to the Metropolitan Tribunal for marriage cases and the court of the first instance. Also, starting from 1900, Ivan Bartoshevsky performed the duties of a synodal examiner (NSLUL, f. 132, d. 8).

It is important to mention the fact that, despite being busy with church and University affairs, Professor did not stop practising school catechesis. This enabled him to share with future specialists not only theoretical knowledge, but also his own professional experience. In 1884, Ivan Bartoshevsky started working at the Lviv Gymnasium IV, where he continued his catechetical activity. He worked at higher real school previously (NSLUL, f. 132, d. 8).

A researcher of Galician schooling, Iryna Kurliak, claims that the content of the Gymnasium religious education of that time, in addition to purely theological information, also contained a wide range of general education knowledge needed by a secular cultured person. At gymnasiums the study of religion performed not only educational, but also educational and developmental functions, and became an important factor in the spiritual and moral development of the Ukrainian youth and humanization of education in general (Kurliak, 2000, pp. 44–50).

The tangential direction of Ivan Bartoshevsky's professional activity became preaching activity. In the Christian liturgy, the sermon, especially its educational component, is traditionally the main empathic point of contact between the priest and the believers, evidence of their spiritual and emotional unity. The intersection of Theology and Pedagogy quite expectedly became an important object of professional interests for Professor Ivan Bartoshevsky, but he was not limited to practical homiletics. In 1905, a homiletic seminar for Greek Catholic students was established under his leadership at the Department of Pastoral Theology. Leading this didactic project, Professor actually organized a powerful centre for improving preaching skills for future pastors (Wydział Teologiczny, 1934, p. 18).

As early as the early 1870s, even before his ordination, Ivan Bartoshevsky was an active participant in the religious life of Lviv and Galicia. In 1872 – 1880, he headed the editorial board of the church magazine “The Ruthenian Zion” (later “The Halytsky Zion”, in 1887 – 1898 he was a member of the editorial board of the magazine “Dushpastyr” – the printed organ of the Society of St. Apostle Paul, and since 1893 – the deputy chairman of the mentioned above society. The task of this community was to help Ukrainian Greek-Catholic priests in their daily ministry, and the above-mentioned printed publications aimed at highlighting the problems not only of the church, but also of a pedagogical and socio-political life of the region. Also, on their pages, in the above-mentioned periodicals there were published pieces of advice to priests who asked the editors a wide range of theological, homiletical, educational and other issues. Despite the fact that the periodicals were written in

an outdated etymological spelling, when the vernacular language was conveyed by difficult-to-read verbal constructions, they belonged to the progressive Ukrainian national movement in the church life of Galicia at the end of the 19th century and opposed their opponents from the Muscovite camp successfully (Antoniak & Mudryi, 2012, p. 582). Until the beginning of the 20th century all of them switched to the vernacular Ukrainian language.

The turn of the 19th and 20th centuries became, perhaps, the most fruitful for Ivan Bartoshevsky. He not only continued to publish homiletics, but also prepared two editions of a teaching manual on Pedagogy based on his own lectures conducted to students of Lviv University. This manual became the first academic textbook on Pedagogy written in Ukrainian (Bartoshevskiyi, 1891; Bartoshevskiyi, 1909). In turn, Professor's studies on the historical sources of Christianity culminated in a fundamental seven-volume edition of the Holy Scriptures with the author's explanations and comments, which had been published for almost ten years (Sviate Pysmo, 1900 – 1908).

Coexistence of several ethnic and religious identities in Galicia at the time had different dimensions and inevitably affected the everyday life of every man and woman of Galicia. At one time, in the wide halls of the Versailles Peace Conference, a witty thought was uttered by the Polish geographer Edward Romer: "The ethnographic line between the Poles and the Ukrainians in Galicia passes through the marital bed, and the city of Lviv lies exactly in the middle of that bed" (Shakh, 1955, pp. 67–68). The author of the phrase cited the Sheptytsky family, well-known in the region, as an example, but the above-mentioned applies to Ivan Bartoshevsky as well.

Having received the priesthood at the age of 23, he made it impossible for him to get an official marriage in the future, but there was a beloved woman in his life. Her name was Yulia Parandowska, who became known as the mother of the Polish writer, essayist and translator Jan Parandowski. She was born in Mostyska (nowadays – Lviv region) in 1859. Later she moved to Lviv, worked as a tailor, and got acquainted with Ivan Bartoshevsky. (Pawlak, 2018). This could not have happened before the end of the 70s of the 19th century, since to acquire the worker's profession one had to finish a craft school. At that time, Ivan was a priest, and he could not legitimize his relationship with the girl.

In 1895, Yulia Parandowska's son Jan was born – in the future, a famous Polish writer, essayist and translator, who was recorded in the register book by his mother's last name. In the column "Origin" there was the indication "illegitimi", which was usually used for illegitimate children. His grandmother Maria Bartoshevaska became the boy's godmother (CSHAUL, f. 201, d. 4-A, c. 6822). Subsequently, in some of Jan Parandowski's documents (in particular, University ones), Ivan Bartoshevsky was listed as a guardian (SALR, f. 26, d. 15, c. 645).

The paternity issue remained unclear for a long time. In his autobiographical works, Jan Parandowski chose to avoid the issue of his father, although he very fondly mentioned a grandmother Maria (Ivan Bartoshevsky's mother), who died when her grandson was at the age of 13 (see Jan Parandowski's stories "Zegar słoneczny" ("The Sun Clock") and "Akacja" ("Acacia")). For the first time, his granddaughter, Polish actress Joanna Szczepkowska, openly wrote about Ivan Bartoszewski's role in the lives of Jan Parandowski and his mother Yulia Parandowska. In the book "Who you are. The Beginning of the Family Saga", which saw the light of day in 2014, she writes about the fact of Ivan Bartoshevsky's paternity as an undoubted fact (Szczepkowska, 2014).

Until 1902, three generations of the Bartoshevsky family lived together at the address of st. Khorunshchyny, 18 (nowadays – Skoryka St., the former Tchaikovsky St.). The following



year, Ivan Bartoshevsky and Yuliya Parandowska became co-owners of an apartment on Roberta Domsa Street, 5 (nowadays – Voitovycha Street), not far from St. George’s Cathedral. This information is recorded not only in the address books of the city of Lviv, but also in the perfectly preserved business cards of Ivan Bartoshevsky, stored in his archived personal file (NSLUL, f. 132, d. 8).

World War I disturbed the usual course of life of the inhabitants of Galicia, which was followed by active hostilities. The Bartoshevsky family could not avoid the stormy events. For example, Jan Parandowski, who had just entered Lviv University to study classical Philology, was taken by the Russian occupiers to Voronezh and Saratov, and in 1919 only after returning home was he able to continue his studies. In Lviv University, the educational process was suspended from the autumn of 1914 to the summer of 1915, and resumed only after the deoccupation by the Austrian troops (Krykun, 2011, pp. 37–53). According to the educational plans, in 1915/16 Professor Ivan Bartoshevsky once again conducted lectures on the course “Christian Pedagogy” for students of the Theological Faculty (Program Wykładów, 1916, p. 4).

Information about the end of Professor Ivan Bartoshevsky’s academic career is controversial. Until recently, there has been a claim in Ukrainian pedagogical science that in 1918, as a sign of protest against the occupation of Galicia by Poland and the Polonization of Lviv University, he quitted teaching career (Hertsyuk & Leshchak, 2022, p. 203).

The opposite version is presented in the official essay of the history of the Theological Faculty, which saw the light during the second interwar decade (Wydział Teologiczny, 1934). After Poland regained its independence in 1918, the new government decided to test clerical and scientific personnel for loyalty, and all public officials were ordered to take an oath of loyalty to the Polish state (SALR, f. 26, d. 8, c. 421). Professors of the Theological Faculty at Lviv University took such an oath on May 30, 1919. Among the five teachers of the Ukrainian origin, four abstained from this act, namely: Fr. Prof. Yosyp Komarnytsky, Fr. Prof. Titus Myshkovsky, Fr. Dr. Teodozій Tyt Halushchynsky and Fr. Julian Dzerovych. Thus, Fr. Prof. Ivan Bartoshevsky was the only one from this group who did not shy away from taking the oath. The following year, in 1920, Professors Komarnytsky and Myshkovsky also expressed their desire to take such an oath, but all three did not return to teaching due to their age and retired (Wydział Teologiczny, 1934, pp. 104–105).

Ivan Bartoshevsky died in 1920, namely on December 13 (in individual sources – on December 14 or 15), in his own apartment on Domsa Street. The funeral ceremony took place at the Lychakiv cemetery with the participation of the University authorities (Wydział Teologiczny, 1934, pp. 104–105). The book of burials kept in the State Archives of Lviv region attests to the fact that four people were buried, namely, Hryhoriy Bartoshevsky, Maria Bartoshevska, Ivan Bartoshevsky and Yulia Parandowska – in the Bartoshevsky family burial place located on Field 51 (SALR. 3152/1/33/22). Yulia Parandowska’s name is not indicated on the tombstone. It is known that she died in 1925, at the age of 66, of a serious illness (Pawlak, 2017, p. 146). According to generally known data, Jan Parandowski graduated from Lviv University and in a few years moved to Warsaw, where he continued his literary activities.

**The Conclusion.** Summarizing the life path of Ivan Bartoshevsky, we single out the following periods of his biography:

- 1) in 1852 – 1875 – education and formation of worldview foundations;
- 2) in 1875 – 1890 – professional development and growth in priestly ministry and practical Pedagogy;



3) in 1891 – 1914 – the peak of a creative and professional activity, when a church career was added to academic Pedagogy and scientific activity developed;

4) in 1914 – 1920 – the war and early post-war years, which coincided with Ivan Bartoshevsky's physical fading and withdrawal from professional activity.

The main directions of his activity included:

- pedagogical activities at Lviv University, namely, teaching Pastoral Theology and Pedagogy for students of the Theological Faculty of the Greek-Catholic faith;

- catechetical activities at Lviv gymnasiums;

- scientific activity in the field of Theology and Pedagogy, in particular writing and publishing University textbooks;

- church activities at the Lviv Greek Catholic Metropolis;

- a homiletic activity, namely practical homiletics, publication of sermons, and teaching students of Lviv University the basics of homiletic skills.

- religious and educational journalism in the Galician church and secular press.

- Scientific, pedagogical, ecclesiastical, literary and public activities became for Ivan Bartoshevsky a multiple professional core, the segments of which enriched each other. Owing to synergy, Professor Bartoshevsky became a bright representative of the religious trend in Ukrainian national Pedagogy of the end of the 19th and the beginning of the 20th centuries.

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**UKRAINIAN EDUCATION IN THE POLITICAL CONCEPT  
AND PRACTICAL ACTIVITIES OF MYKOLA MIKHNOVSKY**

**Abstract.** *The purpose of the research is to analyse the place of the educational factor in the political concept and practical activity of Mykola Mikhnovsky, who at the beginning of the 20th century initiated an independent trend in Trans-Dnieper Ukraine. The research methodology is based on the principle of historicism and the psychological approach, which allow analysing the connection between the language issue and national identity. The scientific novelty of the research consists in the analysis of the education system in the Russian Empire as a means of assimilation of the Ukrainian population into the Russian ethnos. It has been determined that opposition to the assimilationist policy became a means of consolidating the Ukrainians in their struggle for the Ukrainian identity, formation of a modern European nation, and revival of an independent Ukrainian state. The Conclusion. M. Mikhnovsky concluded that the national liberation of Ukraine was impossible without a radical*

political and socio-cultural break with Russia. One of the most important means of achieving this goal was an effective system creation of the Ukrainian public education. It was education that was to become a powerful factor in the transformation of the Ukrainians into a modern nation capable of the Ukrainian independent building. A century of searches and bloody tragedies had passed before the Ukrainian society realized that the future of Ukraine is impossible without its radical de-Russification, decolonization, socio-cultural distancing from Russia and civilizational reorientation towards Europe. Today, the format of cultural and educational relations between Ukraine and Russia, which was proposed by M. Mikhnovsky, turned out to be quite appropriate. The “window of opportunity” for this opened during the full-scale Russian-Ukrainian war, which began in February of 2022.

**Key words:** independence, autonomy, assimilation, Russification, national school, Ukrainization, nation building, Ukrainian revolution.

## УКРАЇНЬСЬКА ОСВІТА В ПОЛІТИЧНІЙ КОНЦЕПЦІЇ І ПРАКТИЧНІЙ ДІЯЛЬНОСТІ МИКОЛИ МІХНОВСЬКОГО

**Анотація.** *Мета роботи* – проаналізувати місце освітнього фактора в теоретико-політичній концепції та практичній діяльності Миколи Міхновського – видатного діяча українського національно-визвольного руху, який на початку ХХ ст. започаткував на Наддніпрянській Україні боротьбу за самостійність. **Методологія дослідження** ґрунтується на принципі історизму та психологічному підході, які дають змогу проаналізувати зв'язок мовного питання та національної ідентичності. **Наукова новизна дослідження** полягає у підході до національної освіти як до засобу консолідації українців у їх боротьбі за українську ідентичність і як важливого фактора формування модерної європейської нації та відродження незалежної Української держави.

**Висновки.** М. Міхновський дійшов висновку, що національне визволення України неможливе без радикального політичного і соціо-культурного розриву з Росією. Одним із важливих засобів досягнення цієї мети було створення ефективної системи української народної освіти. Саме освіта мала стати потужним фактором перетворення українців на модерну націю, яка здатна побудувати незалежну Україну. Пройшло століття пошуків і кривавих трагедій, перш ніж українське суспільство усвідомило, що майбутнє України неможливе без радикальної дерусифікації, деколонізації, соціо-культурного дистанціювання від Росії та цивілізаційної переорієнтації на Європу. Сьогодні виявився цілком слушним формат культурно-освітніх відносин України з Росією, що його запропонував М. Міхновський. “Вікно можливостей” для цього відкрилося у ході повномасштабної російсько-української війни, яка почалася у лютому 2022 р.

**Ключові слова:** самостійність, автономія, асиміляція, русифікація, національна школа, українізація, націотворення, Українська революція.

**The Problem Statement.** In 1991, after the collapse of the USSR, the Russian Federation continued the traditional imperial policy of Russification of the educational sphere in Ukraine. At the same time, the development of the national education system took place (Ihnatenko et al., 2022). The issue of protecting the Ukrainian national identity in the education system of Ukraine became especially acute in the context of the full-scale Russian-Ukrainian war that began in February of 2022. In this context, the views of M. Mikhnovsky on the development of the education system and formation of the national identity among the Ukrainian youth, which he formulated at the beginning of the 20th century, are extremely relevant. The research is dedicated to the 150th anniversary of Mykola Mikhnovsky's birth.

In the 19th and at the beginning of the 20th centuries, education began to acquire a mass character and turn into a tool for accelerating modernization of the society. At the same time, it became the most important factor in the formation of state ideology. As for multinational states, such as the Russian Empire, education was transformed by their ruling regimes into a means of assimilation of national minorities, in particular, the Ukrainians. It is natural that

this policy caused discontent among the Ukrainian intelligentsia, who accepted the native language and national education as a means of national self-preservation and the formation of modern nations. National liberation movements are formed, in the programmes of which the national cultural revival, native language and school occupy a central place. Gradually, these movements, which initially were of a purely cultural character, rise to the level of political demands. Conviction grows that a normal development of the nation is impossible without achieving its sovereignty in various forms – from cultural and national autonomy to complete independence. This general rule had its own specifics in each individual case. In particular, the representatives of the Ukrainian liberation movement, defending the fact of the historical separateness of Ukraine, had to overcome the Russian imperial myth about the ethnic, political and cultural unity of the Ukrainians and Muscovites-velykorosy.

Under the conditions of Trans-Dnieper Ukraine, which was part of the Russian Empire, the national movement began to acquire a political character at the end of the 19th – the beginning of the 20th century. One of its prominent representatives was Mykola Ivanovych Mikhnovsky, who advocated a radical socio-cultural break with the Russian society. In his famous work “Independent Ukraine”, he initiated the slogan: “One, united, indivisible, free, independent Ukraine from the Carpathian mountains to the Caucasus”. All multifaceted theoretical and practical activities of M. Mikhnovsky, in particular, in the educational sphere, were devoted to the achievement of Ukraine’s independence.

**The Analysis of Recent Researches and Publications.** Before the declaration of Ukraine’s independence, few researches were done on M. Mikhnovskyi’s life and activities and only by representatives of the Western Ukrainian diaspora. After 1991, various aspects of his activities became the subject of analysis by domestic historians (Turchenko, 2023). Monographic studies, etc. appeared (Kolesnyk & Cheberiaiko, 2022; Pyrih, 2023). But the issue of M. Mikhnovsky’s understanding of the role of an educational factor in the Ukrainian liberation movement was not considered specifically. Under the conditions of the systematic ideological war of the Russian Federation against the Ukrainian national identity, the views of M. Mikhnovsky on the role of education in the formation process of national consciousness become especially relevant. In 2015, the collection of works by M. Mikhnovsky was published (Mikhnovskyi, 2015b). The publication contained his main work “Independent Ukraine”, in which the programme principles of the Ukrainian liberation movement, aimed at achieving independence, were formulated. In the collection there are also other programmes “The Programme of the Ukrainian People’s Party”, “Workers’ Issues in the Programme of the UNP”, “The Issues of the Ukrainian Intelligentsia in the Programme of the UNP” and other articles, notes, appeals, leaflets written by M. Mikhnovsky personally and a co-author. The basis of our article is the above-mentioned works, which allow us to do research on the theoretical views and practical activities of M. Mikhnovsky in the field of national education and related processes of the Ukrainian nation-building.

**The Results of the Research.** As a Ukrainian politician, Mykola Mikhnovsky began to form at the beginning of the 1890s, having been educated in Ukrainophile student circles and in “The Tarasivtsi Brotherhood”. In the programme document of the Brotherhood “Profession de foi young Ukrainians”, among the co-authors of which M. Mikhnovsky was, the objective was set: “... To devote all strength to freeing the nation from the oppression in which it is now and to give one more free-spirited unit for the benefit of humanity” (Profession de foi molodykh ukrainsiv, 1983, p. 20).

The political views of “young Ukrainians” were based on the national concept of Ukraine’s historical past, which boils down to the postulate: “The science and life of the Ukrainian people



prove to us that Ukraine was, is, and will always be a separate nation”. This formula denied the official imperial version of history, which presented the past of Ukraine as a fragment of the all-Russian historical process. In particular, this concerned one of the main issues in the programme – preservation of the Ukrainian language and creation of a native school “with Ukrainian as a language of instruction”. Emphasizing the importance of this issue, the authors of the programme cited, in addition to purely historical arguments, the conclusions of related sciences: “On the basis of ... psycho-physiology<sup>1</sup>, we know that language is one of the most important signs that best reveals the inner meaning of nationalism, that language is an organ of the spirit and an indicator of national psychology. People without writing in their native language do not constitute the nation” (Professione de foi molodykh ukraintsiv, 1983, p. 23).

In the first half of the 1890s, M. Mikhnovsky was a witness to a discussion between M. Drahomanov, who at one time considered “the Russian literature as the alpha and omega of all Ukrainian ideals” and “considered Ukrainian literature to be a part of Moscow literature”, and B. Hrinchenko, an active member of “The Tarasivtsi Brotherhood”, who, on the contrary, claimed that “The Ukrainian literature was not, is not, and will not be a part or outgrowth of Muscovite, but was, is, and will be an independent literature that the Ukrainian people strive to express their mental life” (Hrinchenko & Drahomanov, 1994, p. 22). But at the same time, B. Hrinchenko was sure that, politically, the Russian state would eventually transform into a federation of equal states, in which Ukraine would be provided with conditions for the development of independent Ukrainian literature and culture in general.

In this discussion, M. Mikhnovsky supported B. Hrinchenko’s views, but he drew purely political conclusions from the correspondence of two prominent Ukrainians. During the period of his membership in “The Tarasivtsi Brotherhood”, M. Mikhnovsky formed himself as a supporter of Ukraine’s independence. According to his conviction, the preservation and development of the Ukrainian language, culture and the Ukrainians as a separate ethnic group is possible only under conditions of a complete political independence of Ukraine from Russia. In the pamphlet “Independent Ukraine” (1900), he depicts a dramatic perspective of Ukraine’s further stay within the Russian Empire: “A black flag hangs above us, and on it is written: “Political death, national death, cultural death for the Ukrainian nation?” These are not the words only: the meaning corresponds to them” (Mikhnovskyi, 2015a, p. 70).

Let’s return to education as one of the main factors of cultural development and self-preservation of the nation. M. Mikhnovsky knew about its condition in Trans Dnieper Ukraine – from primary school to university – from his own experience. Let us quote the words from a speech he delivered at a meeting of the Kharkiv Society for the Promotion of Literacy among the People in 1901: “At school the language of instruction is Russian... A velykoruska child, coming to school, hears from the mouth of a teacher and finds in a book his native and familiar language from home... A maloruska child is in a completely different situation in this same school: From home, from this bright paradise, – writes K. Ushynsky about maloruska school, – where everything is clear, understandable, close to the heart, a maloruska child falls into a dark hell, where everything is dark, foreign, incomprehensible”. Then M. Mikhnovsky asks: “... What did the school do?”. And he answers in the words of K. Ushynsky: “Worse than nothing: it delayed a child’s natural development for several years... Such a school does not develop a person’s soul, but spoils it” (Mikhnovskyi, 2015a, pp. 298, 299).

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<sup>1</sup> There are meant the results of scientific research of a famous Ukrainian scholar-linguist, psychologist, philosopher and literary critic, Professor of Kharkiv University Oleksandr Potebnia (1836 – 1891). He developed the concept of an organic connection between language and psychology, culture and lifestyle. He initiated the psychological direction of linguistics, proved the correlation between language and national issues.

Anti-Ukrainian policy was pursued by Russia quite consciously. M. Mikhnovsky briefly formulated the imperial policy goal in the field of education: "... The Ukrainians go to moscow schools, become completely moskalized and join the Russians" (Prohrama, 2015, p. 293).

Often among Ukrainian children, verbal violence caused an internal psychological conflict. The world of children's harmony was divided: on the one hand, there was what was said (often in an incomprehensible language) at school and what should be studied under the threat of punishment; on the other hand, it was close and well-understood, which grew out of the stories of parents, acquaintances, legends, folk songs, but which was not mentioned at school.

Many intellectuals of Ukraine went through a similar psychological torture. These psychological features were an important factor in the formation of their Ukrainian identity. Hence the desire to approve and protect it from outside encroachments.

M. Mikhnovsky was well aware that the purposeful denationalization of the Ukrainians had also negative social consequences to them. In this regard, M. Mikhnovsky noted the following: "Darkness is a way of keeping our nation captive" (Mikhnovskyi, 2015a, p. 171). If education for Russian-speaking residents of Ukraine, in particular secondary and higher education, was a springboard for climbing to the higher rungs of the social pyramid, it left the Ukrainians at the social bottom: "A nation that does not have its own school must naturally be dark, uncultured; it forms the lower classes, the classes of rural and urban proletariat, and thus descends into a service role to other nations, more cultured, a nation performs servile duties to the latter" (Prohrama, 2015, p. 282).

Having no illusions about the imperial regime educational policy, M. Mikhnovsky nevertheless, in his speech at the meeting of the Kharkiv Literacy Society, proposed to raise a petition before the Minister of Public Education about "the introduction of the malorosyiyska language as a means of teaching subjects of the school curriculum and the Russian state language at malorosyiyski schools in Kharkiv province, and about the admission of malorosyiyski textbooks adapted to the geographical, climatic, and living conditions of the local population to these public schools ..." (Mikhnovskyi, 2015b, p. 301).

Taking into account the pro-Russian composition of the society, M. Mikhnovsky submitted an extremely moderate draft of the resolution, which, in addition to the subjects of the school curriculum, provided for the effective teaching of the Russian state language to the Ukrainian children. At the same time, he recalled a positive experience of teaching in the Ukrainian language in Ukraine in the early 1860s, when the language bans of 1863 and 1876 were not yet in effect. At that time, the Ukrainian specialists, who were aware of the shortcomings of the Russian school in Ukraine, prepared a whole series of textbooks and manuals, with the help of which they conducted a pedagogical experiment with two groups of children. In one group, training was conducted according to the Ukrainian textbooks, and in the other – according to Russian textbooks. It turned out that the Russian language is ineffective for teaching literacy to the Ukrainian children, and they learned literacy "amazingly fast" in their native language (Mikhnovskyi, 2015b, p. 301). However, M. Mikhnovsky's arguments did not affect the pro-Russian members of the society. The Russian liberals who were the members of the society did not agree to support the project.

M. Mikhnovsky understood that it was impossible to change the content of educational policy in Ukraine under the conditions of the imperial regime. Instead, M. Mikhnovsky and his like-minded people made it a rule to communicate and address their like-minded people exclusively in the Ukrainian language. One of the ten commandments of the UNP ran: "Use

the Ukrainian language everywhere and always. Let neither your wife nor your children curse your home in the language of foreign oppressors” (X zapovidiv UNP, 2015, p. 212).

Criticism of the anti-Ukrainian content of humanitarian policy in the empire, as well as the educational process at Ukrainian schools, was closely intertwined with various illegal political actions carried out by the independents under the leadership of M. Mikhnovsky. In particular, the Statement of the Ukrainian People’s Party on the Russo-Japanese War, which was distributed like a postcard, ran: “Muscovites force us to speak in Muscovite everywhere: at school, at the post office, in court, and even in church. They teach our children humility and it seems that they are also “Russian” (Vidozva, 2015, p. 294).

This was also the case during the dynamite attack on the monument to O. Pushkin, which was carried out by members of the UNP in Kharkiv in October of 1904. In the postcard found at the scene of the explosion, O. Pushkin is characterized as “a moscow writer who portrayed the figure of our patriot Hetman Ivan Mazepa in his works vilely and falsely”. O. Pushkin’s poem “Poltava” was meant, which was written on the order of Nicholas I, in which Mazepa is represented as a thief, about whom

Few people may know...  
That he is ready to shed blood like water,  
That he despises freedom,  
That there is no homeland to him.

According to special instructions of the Imperial Ministry of Education, students of secondary schools in Russia had to learn these words by heart. The author of the postcard was indignant that the national genius of Ukraine, Taras Shevchenko, “still does not have any monument in his native Ukraine, and the government on taxes, collected from the Ukrainian population, erects monuments to people hostile or indifferent to the interests of this population. T. Shevchenko is our Great Poet, and O. Pushkin is yours, so who should have a monument in Ukraine sooner??? – the author of the postcard addresses “Moscow society and government” (Lystivka, 2015, p. 309).

In its struggle against the Russifying policy of tsarism, the Ukrainian national intelligentsia sought allies among representatives of other peoples of the empire. Many Ukrainians hoped that the Russian people would become such an ally mediator. But it turned out to be an illusion. M. Mikhnovsky constantly emphasized that in the confrontation between the tsarist government and the Ukrainian movement, the Russian liberal intelligentsia and Russian socialists, as a rule, supported with the Russifiers. In the programme of the Ukrainian People’s Party (UNP) it was stated: “The Russian government and society hope that the Ukrainians can be transformed into Muscovites, and therefore eliminate everything that can arouse the national consciousness of the Ukrainians”. Concreting the position of “society”, the authors of the programme ask a rhetorical question: “Was it voting for the Ukrainian language to be used at the Ukrainian schools, courts, and administration, or was it voting for the ban on the Ukrainian press and literature to be cancelled?” (Prohrama, 2015, p. 227).

M. Mikhnovsky understood that the requirement of the native language and education permission went far beyond the purely educational mission. Constantly he emphasized the role of the Ukrainian education as a powerful factor of mass national education and neutralization of non-national assimilationist influences: “The Ukrainian free school will be for the Ukrainian people the light that will dispel thick darkness with which they were enveloped by various uninvited educators-moskalizers, polonizers, madiarizers; the Ukrainian free school will be the light that will illuminate the path to freedom, will be the fire that will be tempered a free spirit that melts away our eternal chains”.

The UNP programme also points out the Ukrainian education as a factor in the education of a new generation of the Ukrainian intelligentsia: “The Ukrainian free school will give the people a Ukrainian intelligentsia, will give them organizers, agitators; this intelligentsia will enlighten the Ukrainian people, develop the national and class consciousness of the worker and farmer – organize them” (Prohrama, 2015, p. 196).

Before the revolution of 1905, M. Mikhnovsky focused on the work among the Ukrainian workers and farmers. After the defeat of the revolution, the spectrum of his social views expanded. This expansion was connected with the departure from the populist view on the Ukrainian society, which involved the assessment of society as classless and democratic, and a gradual transition to the platform of a moderate conservatism (Turchenko, 2020, pp. 268–269).

This evolution was especially vividly reflected in the pages of “Snip”, the Ukrainian weekly published by M. Mikhnovsky in Kharkiv in 1912. “A nation, in a modern sense of word, – it was noted in the front page of the periodical dated October 21, – consists of many social layers, and when a people does not have one or more layers, it is not a people, but an ethnographic mass” (Snip, 1912, October 21).

Analyzing the lessons of the elections to the State Duma, M. Mikhnovsky concludes that one of the reasons for the failure was insufficient development of the national bourgeoisie, crafts, and the Ukrainian intelligentsia. Hence there were the conclusions: “it is necessary to Ukrainize the bourgeoisie”, “it is necessary to develop the intelligentsia of the highest levels, to focus on small-scale fishing and handicrafts” (Snip, 2012, October 21).

M. Mikhnovsky’s appeal to the need to unite all social groups of Ukraine with different social interests through a sense of national unity also testifies to his understanding of the process of the latest nation-building. In order for the Ukrainians to turn from an ethnographic mass into a nation, M. Mikhnovsky writes, “one must have common, so to speak, national ideas or an ideal. But they affect the masses only when, after a long, slow evolution, they have turned into feelings. Then they are completely protected from disputes and it takes a very long time for them to disappear. And then they have enormous power. Such basic ideas are extremely strong in the collective soul of the nation. Reduced to one idea or ideal, they appear as an invincible moral force. This is the moral force that constitutes the main meaning of the nation” (Snip, 1912, March 25).

This approach of M. Mikhnovsky to the formation of the Ukrainian nation corresponds to modern scientific ideas about modern nation-building. If ethnic consciousness is formed spontaneously through the native language, folk creativity and the circumstances of a common life, then the feeling of national community is brought to the masses by the intelligentsia through education, the press and other forms of influence on the mass consciousness. It is worth noting that the most recent aggression of the Russian Federation began, including with ideological sabotage – attacking Ukrainian historical education in the 2010s with the aim of emasculating Ukrainian identity (Terno & Turchenko, 2022; Sytnyk & Sytnyk, 2020).

M. Mikhnovsky calls the sense of community “a healthy Ukrainian nationalism”, which unites the Ukrainians of different social groups. But in the article published in the censored “Snip” periodical, M. Mikhnovsky does not dare to use this word. The reader who followed M. Mikhnovsky’s publications will find the word in the article “Nationalism and Cosmopolitanism”, published in 1906 in the first and only issue of the newspaper “Slobozhanshchyna”: “... Avoiding the national chauvinism of the ruling nations, it is necessary to nurture the healthy nationalism of the enslaved peoples, because it is a source of creativity, and only in that are hidden the seeds of national freedom and a new future”

(Slobozhanshchyna, 1906, March 25). At the same time, M. Mikhnovsky calls the main misfortune of our nation “the lack of nationalism among the general public” (Sprava, 2015, p. 260).

Thus, the Ukrainian school was considered as a guarantee of preservation of the Ukrainians as a separate ethnic community capable of transforming into a modern, socially stratified nation. And the emerging nation will be able to create its own state.

However, there were no drastic changes in the educational sphere of Ukraine during the imperial times. In February of 1917, autocracy finally fell in Russia, and a national and democratic revolution began in Ukraine. The Central Rada (TSR) emerged, which demanded that the Provisional Government of Russia recognize the autonomy of Ukraine. But the Russian liberals and socialists in the Provisional Government refused to meet the demands of the Ukrainians.

M. Mikhnovsky was an active participant in the revolution, he was one of the leaders of its independent wing. He was one of the first Ukrainian politicians to make a disappointing conclusion in the summer of 1917: “All the people of Moscow, regardless of party or faith, from the far right to the far left, from the minister to the worker – all the people of Moscow are united in the opinion that they are the heir of the tyrant and master of Ukraine. ... All Russians want a unitary (unifying) Democratic Republic... The people of Moscow, not one or another party, but the whole nation wants to be the master of the Ukrainian people ... One is fighting for liberation, the second – for domination over the first” (Mikhnovskyi, 2015b, pp. 321–322). The Ukrainians became convinced of the correctness of M. Mikhnovsky’s conclusion when, during the military operations of 1918 – the 1920s, Ukraine was under the control of either the Bolsheviks or the White Guards. The national policy of these diametrically opposed Russian political forces was similar towards Ukraine. The only difference was that the Bolsheviks far surpassed the White Guards in their demagoguery and populism.

Eventually, in the early 1920s, Ukraine came under the control of the Bolsheviks. However, the Bolshevik regime did not manage to completely destroy the achievements of the Ukrainian revolution completely. In 1917 – 1921, crucial changes took place in the Ukrainian society: the Ukrainians who survived the periods of the Central Rada, the Ukrainian state of P. Skoropadsky and the Directorate of the Ukrainian People’s Republic, were internally reborn and began to feel like a nation that has the right to its own state, language, and education. The Bolsheviks could not ignore these changes and were forced to mask their purely unitarist intentions by agreeing to the slogan of the Soviet Federation. They came to this not of their own free will, but under the influence of national movements on the outskirts of the Russian Empire. “... Both Lenin and his colleagues were most impressed by the development of the Ukrainian movement” (Hrytsak, 2011, p. 60).

Under these conditions, the Bolsheviks went for the formation of Soviet Ukraine as a separate administrative and territorial entity within the borders of the all-Soviet state with its center in Moscow. “Ukrainization” was even proclaimed. This meant recognition of the Ukrainian language, Ukrainian national culture, art, and education, but users were required to provide them with a “socialist content”. They even agreed to recognize the existence of the Ukrainian nation. However, in accordance with the provisions of Marxism, it was clarified that the Ukrainian nation, as well as other nations of the Soviet Union, has a long history of formation – through nationalism and a bourgeois nation to a socialist one. The “perspective” was also outlined – the rapprochement and merger of the “socialist Ukrainian nation” with other “socialist nations” of the USSR. Although Ukrainianization was a forced step, and the



Soviet Federation was considered only as a temporary option, the communists never dared to openly declare unitarism during all the years they were in power. The Ukrainian SSR as a quasi-state entity continued to exist until the end of the collapse of the USSR.

In the last years of his life, M. Mikhnovsky witnessed and even participated in the beginning of “Ukrainization” in Kuban, where he moved. This period of his life is described by us on the basis of the documents of the State Archive of Krasnodar Region of the Russian Federation (SAKRRF), which we got acquainted with then, when the Ukrainian researchers had access to them. Oddly enough, M. Mikhnovsky lived under his own name at that time. One of his contemporaries, Ivan Marchenko, with whom M. Mikhnovsky had friendly relations during his stay in the Kuban, wrote in his memoirs that “the local bodies of the Soviet government and the ChK directed all their focus on the fight against the remnants of the Denikin region, against the “cadets”. They were not familiar with the Ukrainian movement. We could say with a clear conscience that we are against the “cadets” and that we are implementing the Soviet national policy” (Marchenko, 2012, pp. 84–85). An important direction of this policy was the “Ukrainization” of education in the region.

At the beginning of January of 1921, M. Mikhnovsky moved to one of the largest stanytsia of the region – Poltavska, where he became a teacher at the Ukrainian Pedagogical College, established on the basis of the former teacher’s seminary, and later its director (SAKRRF, f. 365, c. 574, p. 65).

The authorities did not have a clear idea of M. Mikhnovsky’s past. According to archival materials, he did not mention his pre-revolutionary and revolutionary years, but offered an incomplete and half-true version of his biography. M. Mikhnovsky hid his true views, skilfully using a typical political rhetoric for representatives of the new government.

M. Mikhnovsky’s work, according to contemporaries and his students, was diverse and had significant consequences. He taught various subjects, including the Ukrainian language, the Ukrainian literature, History, History and Theory of Cooperation; was the head of the office of the Ukrainian studies; headed a literary circle. A model school operated at the college, the Ukrainian language was the language of instruction. Many students became teachers and later fondly recollected M. Mikhnovsky. He turned the college into a centre of the Ukrainian life in the region. In his memoirs, I. Marchenko wrote that M. Mikhnovsky made the college “the centre of the national revival in the Kuban” (Marchenko, 2012, p. 85).

From the first days of his tenure as the head of the college, M. Mikhnovsky had to overcome the resistance of opponents of Ukrainization both among the staff and representatives of local authorities. In April of 1923 Chekurov, the inspector of the department of national minorities in region, came to the college. In his speech he stated that although the Ukrainian education was approved by the decisions of the party and the government, this decision was short-sighted and wrong. Therefore, it is better to voluntarily give up the Ukrainian education and merge with the Russian culture, and abandon the Ukrainian language”. This speech provoked a protest by the staff and students. But the very next day, the issue of the Ukrainian language was brought to the meeting of the local stanytsia council. Its executive committee approved the decision “to stop the Ukrainization at schools”. At the meeting Chairman Zhadkov made a speech and described the dire prospect that awaits supporters of Ukrainization: “1. A train will be sent and all teachers-the Ukrainians will be taken to the place where they used to take us; 2. Ukrainization will lead to the fact that guns will be brought to destroy Poltavska stanytsia” (SAKRRF, f. 365, c. 1091, pp. 117a–118).

This chauvinistic action by the opponents of “Ukrainization” took place just in the days of work of the 12th Congress of the RCP(b) in Moscow, at which there was declared a course

for indigenization. It is difficult to say whether M. Mikhnovsky believed in the sincerity of the decisions of the congress, but he decided to take advantage of them immediately. In a letter addressed to the head of the Ukrainian Central Bureau in Moscow, Hadzynsky, he considered the events in Poltavska stanytsia as “the 1st episode of the struggle against the resolutions of the 12th Congress of the RCP(b)”. M. Mikhnovsky asked to send an authoritative commission to the stanytsia, which would inspect the situation there and protect the collective from massacre (SAKRRE, f. 365, c. 1091, p. 117).

The complaint was “sent” to local Ukrainophobic officials. In the spring of 1923, an inspection was carried out. Its result was a secret information of the head of the district executive committee to the head of the region. It ran that the task of Ukrainization at schools in the Kuban was entrusted to people who “usually belong to the extreme independentists, or Petliura’s, or (which is also harmful), the Vynnychenko’s direction”. The surnames of two “wolves in sheep’s clothing” were mentioned – an instructor H. Dobroskok and head of the college M. Mikhnovsky. As for Dobroskok, it was stated, that he “does not stop before threats or violence against teachers and children in his desire to carry out Ukrainization to the extreme”. It was mentioned about M. Mikhnovsky that he “is a bit more sophisticated and political, acts cautiously, but consistently follows the same line”. It was suggested: “these two subjects must be fired, and it would be good “to send them far away””. “The spirit of Petliura hovers over them, and maybe even the spirit of pious Pavlo Skoropadsky...” (SAKRRE, f. 365, c. 1091, pp. 111–114).

According to the results of the inspection, it was decided to transfer the college to the nearby district centre under the supervision of the local district party committee. In October of 1923, M. Mikhnovsky left stanytsia for Krasnodar, and at the beginning of 1924 he arrived in Kyiv, where his earthly journey ended in May of the same year.

**The Conclusion.** M. Mikhnovsky studied the state of Russian education issue in Ukraine thoroughly. He concluded that the imperial policy was based on the Russian official version of history and threatened the very existence of the Ukrainians.

Therefore, the Ukrainians risked losing their national identity completely. Under such conditions, the Ukrainian people were doomed to ethnic disintegration and social pauperization. According to M. Mikhnovsky, only the political independence of Ukraine can protect the Ukrainian people from national and cultural nonexistence, and the Ukrainians from assimilation into the Russian ethnic group. In the discussion between M. Drahomanov and B. Hrinchenko in the early 1890s, M. Mikhnovsky not only supported B. Hrinchenko’s course for complete independence of the Ukrainian literary process, but also extended the idea of independence to the political sphere. M. Mikhnovsky was sure that the government and the Russian society would not agree to the solution of the “Ukrainian issue” by granting Ukraine national-state autonomy. And this is exactly what the majority of Ukrainophiles waited for at that time. The only way to save Ukraine from being absorbed by Russia, in his opinion, is a complete political and socio-cultural break with it. The independent course provided for the support of the Ukrainian language and development of the Ukrainian education. The Ukrainian education, in turn, was supposed not only to raise the cultural level of the Ukrainians, but also to form a new generation of the national intelligentsia. It is the new generation of the Ukrainian intelligentsia, according to M. Mikhnovsky, who should be able to develop a national idea, promote it among the masses, and lead the people to fight for independent Ukraine.

According to M. Mikhnovsky’s strong belief, the Ukrainian education should contribute to the formation of nationally oriented social elites who would materially support the Ukrainian

national movement. In the final analysis, M. Mikhnovsky received national education as a powerful factor in the formation of a full-fledged Ukrainian nation capable of creating its own independent state. In the first half of the 1920s, working under the conditions of “Ukrainization” in public education in the Kuban, once again M. Mikhnovsky became convinced that the Russian state, regardless of its socio-political system and political forces dominating it, remains the enemy of the Ukrainian identity. He saw the only way to preserve Ukrainianness in the complete political and socio-cultural independence of Ukraine from Russia. As the experience of the modern Russian-Ukrainian war shows, the ideas of M. Mikhnovsky proved to be extremely relevant a century later. Therefore, they turn into beliefs of the Ukrainian society.

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**POLISH WOMEN’S FASHION MAGAZINES IN LVIV  
(END OF THE 19th – THE 1st HALF OF THE 20th CENTURY:  
POLITICAL INFLUENCES OF WESTERN EUROPEAN PUBLICATIONS**

**Abstract.** *The political influence of Western European magazines on the Polish women’s fashion magazines has been analysed, which were published in Lviv and on the territory of Warsaw, Krakow,*



and Vienna at the end of the 19th and the first half of the 20th centuries. The Polish women's fashion publications have undergone a transformation process: from appendices of respected socio-political publications to independent publications; from salon fashion publications to socio-political magazines dedicated to women's activity in a political and social life. **The purpose of the research** is to study the thematic field of the Polish women's fashion magazines published in Lviv and distributed in other European cities; to trace the transformation processes of the Polish political women's periodicals formation of the end of the 19th – the first half of the 20th century, which emerged from women's fashion magazines and were influenced by Western European magazines significantly. **The Research Methodology.** There have been used comparative and historical, structural and systemic, and problem-chronological approaches in the analysis of the topics and issues of the Polish women's fashion magazines, which were influenced by Western European magazines; analysis and synthesis of the problems of the Polish women's magazines; a comparative analysis comparing and contrasting the thematic field of the Polish women's fashion magazines. The structural and systemic method made it possible to trace the process of transformation of the Polish women's fashion publications. **The Scientific Novelty.** The transformation process of the Polish women's fashion magazines at the end of 19th and at the beginning of the 20th centuries into socio-political magazines that were influenced by Europe has been studied; the main features of the thematic field of the Polish women's publications, which were characteristic of the publications of these magazines, have been highlighted; general trends in the development of genre features of this group of women's magazines and their connection with the Ukrainian women's fashion magazines have been established. **The Conclusion.** The Polish women's fashion magazines, which were published in Lviv and distributed on the territory of Warsaw, Krakow, and Vienna, underwent a significant transformation: from fashion magazines of an entertaining nature to socio-political publications. These processes were facilitated by the influence of Western European fashion magazines.

**Key words:** transformational processes, Polish women's fashion magazines, salon fashion publications, women's entertainment press.

## ПОЛЬСЬКІ ЖІНОЧІ ЧАСОПИСИ МОДИ У ЛЬВОВІ (кінець XIX – перша половина XX ст.): ПОЛІТИЧНІ ВПЛИВИ ЗАХІДНОЄВРОПЕЙСЬКИХ ВИДАНЬ

**Анотація.** У статті проаналізовано політичний вплив західноєвропейських часописів на польські жіночі часописи моди, які виходили у Львові та на території Варшави, Кракова, Відня у кінці XIX – першій половині XX ст. Польські жіночі видання моди пройшли процес трансформації: від додатків поважних суспільно-політичних до самостійних видань; від салонних видань моди до суспільно-політичних часописів, присвячених активності жінок у політичному та суспільному житті. **Мета статті** – дослідити тематичне поле польських жіночих часописів моди, що виходили у Львові та поширювалися в інших європейських містах; простежити трансформаційні процеси становлення польської політичної жіночої періодики кінця XIX – першої половини XX ст., які постали із жіночих часописів моди і зазнали суттєвого впливу західноєвропейських часописів. **Методи дослідження.** У статті використано порівняльно-історичний, структурно-системний, проблемно-хронологічний підходи в аналізі тематики і проблематики польських жіночих періодичних видань моди, які зазнали впливів західноєвропейських часописів; аналіз і синтез проблематики польських жіночих часописів; компаративний аналіз у зіставленні й протиставленні тематичного поля польських жіночих часописів моди. Структурно-системний метод уможливив відстежити процес трансформації польських жіночих видань моди. **Наукова новизна.** Досліджено процес трансформації польських жіночих часописів моди кінця XIX – початку XX ст. у суспільно-політичні, які зазнали значних європейських впливів; виокремлено головні риси тематичного поля польських жіночих видань, характерні для їх публікацій; встановлено загальні тенденції розвитку жанрових особливостей цієї групи жіночих часописів, їхній зв'язок із українськими жіночими часописами моди. **Висновки.** Польські жіночі часописи моди, які виходили у Львові і поширювалися на території Варшави, Кракова та Відня зазнали суттєвої трансформації: від часописів моди розважального характеру до суспільно-політичних видань. Цим процесам сприяли західноєвропейські часописи моди.

**Ключові слова:** трансформаційні процеси, польські жіночі часописи моди, салонні видання, розважальна жіноча преса.

**The Problem Statement.** Women's fashion magazines occupy an important place among the Polish women's magazines at the end of the 19th – the beginning of the 20th centuries, which were published in Lviv. The first magazine with a fashion page was "Dziennik Mód Paryskich" (1840 – 1848), but this magazine cannot be called a traditional fashion magazine, because starting from Issue 2, the publication changed its profile: in addition to fashion, it contained a large literary and socio-political part. Other Polish women's fashion magazines: "Mody Paryskie" (1895 – 1902), "Nowe Mody Paryskie" (1890 – 1913), "Kobieta w Domu i Salonie" (1925) felt Western European political influences and were similar in genre and organization editors to each other. There were also published two more fashion magazines in Lviv: "Mody Kobiecte" (1933) and "Praktyczna Gospodyni" (1906 – 1914) (dodatek do "Nowa Ilustrowana Garderoba Dziecięca"), which did not have a defined regularity and were poorly preserved, but have similar editorial departments, a well-illustrated page of children's and women's fashion. "Mody Kobiecte" evolved into other fashion magazines, so its trail as a magazine is lost after 1933.

Fashion magazines had several common features: fashion as the main profile of the publication (each magazine had a well-illustrated fashion page with samples of European clothing), the structure and main subject were built according to the same principles as fashion magazines abroad. The publishers of magazines borrowed almost everything for the launch of these publications: the magazine publication (most often a woman in a fashionable outfit on the front page), the main sections devoted to women; the sections devoted to skin care, a woman's appearance, practical advice for every young lady, a discussion of the topic of marriage and advertising of fashionable tailoring companies.

Some of these publications were published not only in Lviv or Polish cities, but also, for example, in Warsaw or Vienna. Not all editions were independent magazines at the initial stages of their existence. At first, they appeared as thematic pages of other magazines, as their supplements with the obligatory fashion page. However, they all have common features, a similar history.

These fashion magazines changed their target audience – the magazine was not only aimed at the rich, wealthy women like "Dziennik Mód Paryskich", but also the middle-class women. The popularity of fashion magazines reached far beyond Lviv and Galicia – even the Ukrainian women subscribed to the Polish fashion publications of this period.

The main examples of fashionable clothing in women's fashion magazines were the Parisian ones, as the names of the publications could be the proof: "Mody Paryskie" and "Nowe Mody Paryskie". The Polish women's fashion magazines, which were published in Lviv, but were distributed in many other Polish and European cities, can be called salon publications.

We trace the salon tradition periodicals' revival in the Polish women's periodicals, but the nature and organization of editorial work were different: superficial materials did not prevail, a large number of practical advisory departments for young ladies appeared, which ensured new salon fashion publications high circulation and popularity among women of various classes people (Dormus, 2020, p. 168). A woman (Dormus, 2019, p. 25), a woman's care for her appearance, education of good social manners, good taste in women's clothing were the focus of every women's fashion publication.

*Femininity* becomes the main feature of many publications. The political activity of women in a public life (Dormus, 2019, p. 112) was the overarching theme of these publications.

**The Analysis of Sources and Recent Research.** We came across the Polish women's fashion publications owing to the monograph, written by Katarzyna Dormus, which

covered the educational aspects of women's publications. Based on this monograph, there is information available about the structure of publications, periodicity, main topics, and conditions for publishing journals. In the work of Jeży Franke, a thorough analysis of the Polish women's publications was carried out and a retrospective of the Polish political women's press development was presented. The role and influence of the Polish women's press in Lviv was discussed in the monograph by Jeży Jarowiecki, who noted that certain groups of women's magazines were influenced by Western European politics. Zbigniew Kmiciek studied revolutionary and political topics in the work "Prasa polska w rewolucji 1905 – 1907". The primary sources of our scientific article were issues and numbers of magazines: "Mody Paryskie", "Nowe Mody Paryskie", "Kobieta w domu i salonie", "Praktyczna Gospodyni", "Mody kobiecy".

**The purpose of the research** is to analyse the thematic background of the Polish women's fashion publications; to carry out a comparative analysis of these publications (headings, genres, issues); to trace the transformation process of these magazines.

**The Results of the Research.** We find the following brief bibliographic information about the "Mody Paryskie" publication: "Mody Paryskie". Monthly supplement to "Głos narodu". The magazine was published on December 1, 1895. There were the outfits, drawings, fashions of different seasons on the title page" (Zalewska, 1938, p. 95). "Mody Paryskie" were originally an add-on. On the first page of the publication, the editors published an article about fashion "Winter Fashion" along with illustrations and drawings of clothes (Mody Paryskie, 1895, p. 1). On Page 2 was the traditional "Mody" editorial department with a description of fashionable clothing in Europe (Mody Paryskie, 1895, p. 2).

Basic bibliographic data about the magazine was given in the work, published by J. Franke: "In 1879, Mody Paryskie: an Illustrated Magazine for Women Appeared. Publishers: Wanga Gansaryk, editor-in-chief – Jadwiga Witkiewicz. This magazine had many problems. Although the editorial office convinced the public of its popularity among the readers, the issues were published irregularly. At the end of 1880, there was even a quarterly cessation of publication of the magazine" (Franke, 1991, p. 166).

"A similar edition to "Dziennika Mód Paryskich" was Lviv publication "Mody Paryskie", which was published in 1895 – 1902 as a supplement to "Głos narodu". The magazine was well illustrated and devoted to fashion. Alexandr Milski edited and published the magazine. It contained: novelties, reprints, literary and political articles" (Dormus, 2006, p. 274).

The first issue of the publication for December 1, 1895, for example, published several poems, short stories and other works of art. The editors introduced the following sections of the "Chronicle of the Women's Movement", short subsections: "Women at the University", "Women's Societies" (Mody Paryskie, 1895, p. 3). The entire spread was devoted to models. Small columns of information content were introduced: "Theatre", in which articles about the winter season and the main performances prevailed, "From Lviv Salon" – about fashion news, "Kitchen" – about recipes, "Economic Tips", "Riddles For the Readers", "Humorous Corner". On the penultimate page, the editors placed an advertisement in color. The last page was devoted to embroidery, embroidery (Mody Paryskie, 1895).

The columns of the magazine "Mody Paryskie" were dominated by the articles about fashion. Sometimes problematic and political articles on the women's issue were submitted. In the "Chronicle of the Women's Movement" section, the editors carried out a brief informational description of the main events in the public life of women. The editors informed their readers about the Polish women's movement, about the women's movement of many

European countries. To this editorial department, columns were added about famous women who receive majors at universities, using their right to learn and get an education (Dormus, 2016, p. 89). The column “Women’s Societies” informed the female audience about various foreign women’s organizations, women’s conferences (Mody Paryskie, 1895, pp. 3–4).

The information columns “Theatre” and “From Lviv Salon” were advertisements and short reports. The column “From Lviv Salon” was popular, in which the editors provided information about the new fashions of the season: fashionable colors, dress fashion, as well as detailed addresses of stores where these dresses can be bought (Mody Paryskie, 1895, p. 5).

Two sections of the editorial office “Kitchen” and “Economic Tips” had a practical character. In the “Kitchen” section, the editors presented cooking recipes for delicious dishes. In the Business Advice section, the editors often answered questions of their audience; to the letters that came to the editorial office with questions. It was the hands-on department of a fashion magazine, transforming the magazine from a narrow-profile into a multi-specialty magazine for women.

The magazine “Nowe Mody Paryskie” was published not only in Lviv, but was also distributed in Warsaw, Krakow, and Vienna. “Nowe Mody Paryskie” began their publication history much earlier, in Warsaw, and in Lviv they were published later, since 1890. The Polish fashion magazines’ scholars considered both magazines “Nowe Mody Paryskie” and “Mody Paryskie” side by side, because the publications had similar names, topics and were published in the same period. In addition, both editions were profiled as fashion magazines that were influenced by Western European politics.

“Nowe Mody Paryskie” was a typical commercial illustrated magazine devoted to fashion. It was a biweekly published in Vienna, as well as in Kraków, Lviv and Warsaw. It was published in Polish during the years 1890 – 1913” (Dormus, 2006, p. 276).

This magazine was popular among the public. The magazine was subtitled “a magazine devoted to women” (Nowe Mody Paryskie, 1890, No. 1), and below it was specified that the weekly was devoted to literature, women’s affairs and fashion. On the first column, the name is presented in a large, beautiful font with a pattern of a fashionable dress. In the magazine there were eight pages.

The first issue was submitted by the information department of “News” (Nowe Mody Paryskie, 1890, No. 1), and already on Page 2 in the “Preface” the editor of the magazine wrote: “We are starting our publication for women, we want to describe in a few pages how we understand its task. In all things women’s clothing; everything related to fashion will be covered by our magazine. Let’s pay attention to what can be useful for women” (Nowe Mody Paryskie, 1890, No. 1, p. 2). Thus, in the first editorial, it was written that the main topic of the publication is a fashion magazine. Fashion is the main profile of the publication. A practical motive appears in the magazine – the benefit to women in an everyday life and home economics.

The traditional sections of this issue were: “Everyday”, “From the week” – short informational news about memorable dates or holidays. Brief information about Palm Sunday was printed in the first issue. The poems were also published: “Poor Girl”, “Fragment” Jaskółka (Nowe Mody Paryskie, 1890, No 1). The translations on the works of world literature (V. Hugo) began to appear in Issue 2, as well as new sections: “Theatrical Report” – the short descriptions of plays, reviews of well-known Polish plays; “Economical Advice” – a practical section devoted to economic management (Nowe Mody Paryskie, 1890, No. 2). Traditional publications were the articles devoted to women’s beauty. For example, the article

“About Beauty” was published in Issue 4, in which *femininity, feminine charm* (emphasis added) became the main features: “It is not enough to be beautiful, you need to have beautiful features, a graceful figure, and white graceful hands; what else is needed for this, you say, dear readers? – Still – the gift of liking” (Nowe Mody Paryskie, 1890, No. 4, p. 2).

There were many similar articles in the columns of this publication. In addition, in this issue, the editors introduce another section of “Conversation on Fashion”, which discussed women’s toilets (Nowe Mody Paryskie, 1890, No. 15). The following editorial departments began to appear in other issues of the magazine: “Chronicle of Kraków” – reviews of famous Kraków plays, biographical information about famous actors; “On Hygiene”, which the doctor filled with content, as well as the articles about nature and plants (Nowe Mody Paryskie, 1890, No 25). Hygienic topics quickly became leading in the magazine. Sometimes the editors gave a piece of advice on how to organize a house, for example, in the section “Household Advice” (Nowe Mody Paryskie, 1890, No 26).

The editors introduced a whole cycle of the articles dedicated to the brides from the twentieth issue. The authors discussed the following issues: fashionable clothing, norms of behaviour, morality and femininity in young girls. These articles were not thorough. The cycle of articles for the brides was reminiscent of the first salon publications for women, which were assigned to the bride and came out earlier. The articles on the subject of marriage were not characterized by emotionality or religiosity, although the magazine shared Catholic values in the upbringing of a young lady (Nowe Mody Paryskie, 1890, No 27).

The magazine paid specific attention to the topic of frugality in the economy. A typical article on this topic was the article “Accounts” by Jany Jeleński, which dealt with frugality as a major problem in farming. The editors saw accounts and frugality as help to the husband, as a constant support, *the right hand in household affairs*. The main widespread opinion, for example, the stereotype of the Polish society, the editors called good management of the household economy by the woman. When a housewife did not always take care of her household thriftiness. *The image of a thrifty, homely, practical woman* was singled out as the general *image of a housewife* (Nowe Mody Paryskie, 1890, No. 15).

The second important topic of the magazine was the topic of raising children, The article “For the Good of Children” written by J. J., in which the problem of Pedagogy was sharply posed, attracts attention among the articles on this topic. Education was represented by a figurative concept – *the tree of education*, which was an important matter. Parental love was not enough for *the tree of upbringing*, but normal pedagogical principles are needed, which will form goodness in children. *Goodness* was the main category in the education of the young Polish generation (Nowe Mody Paryskie, 1890, No. 26).

In Issue 27, a programmatic political article on the women’s question “Where is the work?” was published (Nowe Mody Paryskie, 1890, No. 27, p. 5). Programmatic articles on women’s equality were rarely presented in the magazine’s columns. We trace a certain evolution of views: women were no longer fighting for equality with men; women strived to find and realize themselves in various spheres, strive to expand women’s work: “We returned from the issue of women’s emancipation, which had to start from the end and correct the mistake. Does anyone remember our discussions a few years ago about the “case of women’s equality”? In every article, every magazine it was written about the equality of women; every case touched on this issue. The time came when we talk about the expansion of women’s work” (Nowe Mody Paryskie, 1890, No 27, p. 5). The priority was not emancipation or women’s equality, but women’s activism, participation in public work became the main reference point



for politically active women. The above-mentioned fact showed that women made significant progress – the right to education, political and economic rights, so equality in the article was not relevant. In the women's movement, the issues of women's political activity, women's realization and the search for new forms of women's improvement as significant female progress, which were popular topics of Western European women's magazines of this period, were actualized.

In other issues of the magazine, the editors introduced new sections for their readers: "Medical Conversations", "English Literature", "Literary Chronicle" – a bibliographic department, where anthropological an

The naturalistic articles for children, advice for parents were published. The magazine was transformed from an entertaining fashion magazine into an informative and ideologically political one. The articles on history, anthropology, and nature were aimed at raising the intellectual level of their audience (Nowe Mody Paryskie, 1891, No 1). Therefore, translations of the world works into the Polish appeared in the magazine, which gave young Poles a chance to familiarize themselves with the world literature.

The bibliographic department submitted reviews of the well-known Polish books; recommended books worth reading to a female audience, and also spread the slogan of self-education, which should fill the gap of an imperfect, superficial female education (Nowe Mody Paryskie, 1890, No 25). The "Medical Talks" section was Hygiene Section in which a medical specialist wrote about women's problems, diseases, and how to get rid of many complexes (Nowe Mody Paryskie, 1890, No 15).

One of the leading topics raised by the authors of the magazine was the expediency of using cosmetics for young girls. It was only a female topic. Femininity and beauty become the main tasks of the magazine. Taking care of appearance was the main issue of the articles on the cosmetics issue. Aesthetics and good taste were criteria that influence a woman's choice in using cosmetics. The article "On Appearance Care" by Wiktor Hodacki focused on the cosmetics harmfulness issue to the female body (Nowe Mody Paryskie, 1890, No 25).

Issue 1 of the second year of the publication began with several poems, among them there was a poetry, written by Marji Konopnicki (Nowe Mody Paryskie, 1891, No. 1, pp. 2–3). Traditionally, the editor's column "During the Week" (Nowe Mody Paryskie, 1891, No. 1, p. 6) was submitted, in which the editors submitted an article on a current issue, usually about the moral education of children. Raising children again remained a leading theme of the magazine. The concept appeared in the magazine – *responsibility for the younger generation* and *kindness* – the main basis of a child upbringing. The editors considered educational reform to be a major problem in a child education. Education did not raise a child well enough as a good person and did not instill an interest in books. In the first editorial about the New Year, the editors covered all these important issues of child education: "To start a new life with the new year, it is necessary to leave in the past diseases and pain, patience, irony of fate and bad deeds; you need to have optimism for the second year. But here you still need to single out the sins of the old year to change your behaviour and correct bad deeds. And this is a big step in front of public opinion, because we are responsible for the younger generation, for those little ones who will take their place in the country after us. It is necessary to have resistance to a moral damage that young people experience. When a small child is just born, we say that when he/she completes an education, then will be a smart person. And a child reaches for a book, even on a vacation he has no spare time. Then a father and son go to Warsaw and a tearful mother draws a cross on her son's head. And schools

need reform. As long as a child has an interest, it is necessary to show and lead that interest to the book” (Nowe Mody Paryskie, 1891, No 1, p. 3). An important factor in an educational reform is a public opinion and responsibility of a specific person for raising his child before the community. *Resistance to moral harm* is the main slogan of a good, spiritual, patriotic upbringing of a child in the magazine's articles.

In addition to the articles on child education, literary articles became popular. Life comedy prevailed in the magazine's columns and drama disappeared. Comedy of life as a special genre introduced by the editors was a realistic picture of reality (play), but with a sense of humour, which made fun of the negative aspects of life. The section “Theatrical Viewing” (Nowe Mody Paryskie, 1891, No. 1, p. 6) was published in Issue 1, in which a review of the play by Waclawa Szymanowskiego, Marji Ratyński was published (Nowe Mody Paryskie, 1891, No 1, p. 7). The reviews were written thoroughly and professionally. Criticism was the main feature of these reviews of well-known theatrical performances.

Issue 3 included the rubric “Carnival News” and was devoted to a description of carnival attire with a detailed history of the carnival. In Issue 6 of the publication, an article of a problematic nature “Where is the Work of Our Women?” was published. Jany Jelenski, covered an important topic – mortality among models, who did not finish eating. It was the first problematic article on the world of fashion. *The image of fashion* as a general evil to a female body appeared in the article as the cause of malnutrition and death of young women. Despite a high salary, models wasted their vitality and health because they were forced to stand in the windows of expensive stores for several hours a day. Mortality was a sad consequence of the insatiable world of fashion, which at first glance beckoned with its sophistication, beauty, and intrigue. The article presented the statistics of female mortality convincingly, which reached a high level among beautiful, young girls (Nowe Mody Paryskie, 1891, No 6, p. 4).

In this issue, the editors introduced a new section “On Painting”, which was filled with Bronisław Zawadski's work (Nowe Mody Paryskie, 1891, No. 6, p. 6). There were large, informative articles on the topic of painting. The editors reported on fashion exhibitions, famous paintings by contemporary foreign and Polish artists. Sometimes there were given brief biographical details of famous artists, their relatives and families in this section.

The editors introduced a cycle of articles on children's home education. In Issue 10, the article “Parents and Children” from this cycle of articles was published. *Morality* becomes the main feature of articles on a child-upbringing. Morality should be instilled by parents, school, and church in children from early childhood. The magazine considered the formation of a child's worldview as the main goal of a child education, and *goodness* became a spiritual category for the formation of a future personality. Catholic values were among the moral principles highlighted in the series of articles on child-upbringing.

The small column “Paris Chronicle” was introduced in Issue 14. This column was dedicated to famous artistic actions, and performances of the Parisian public. Sometimes the materials of this section resembled theatre reports, a short retelling of the play, and a description of the main characters, who participated in the play. Traditionally, the first pages of the magazine featured Informational Department “News” – short notes of informational genres about artistic events in Lviv. In the eighteenth issue of 1891, the section “Lviv Chronicle” was introduced – reports on theatre performances in Lviv. The second year of publication of the magazine ended with Issue 23, and the permanent editorial departments were preserved.

As a result, after analysing the editorial departments, columns, and articles of the magazine “Nowe Mody Paryskie” and “Mody Paryskie”, we conclude that the publication

underwent significant European influences, especially in the descriptions of fashionable clothes and political topics – popular in Western European magazines. Moreover, the magazines published many articles on women's beauty, hygiene, child-rearing, and practical business advice. Femininity, aesthetics, and beauty were features characteristic of magazine materials. Hygienic topics for a young female audience became on top. The description of the world of fashion, its problematic nature, and its criticality were characteristic features of articles in publications.

Besides, one of the fashion magazines was the supplement "Praktyczna Gospodyni", which was published in Lviv from 1906 to 1914 and was a supplement to the women's and children's fashion magazine. Illustrations of women's and children's clothing with detailed descriptions of the models were published on the magazine's pages. The monthly magazine did not publicize any problematic article. There were eight pages in the magazine, presented in the form of a pattern, and on the first page there was an image of a woman with a child. "Praktyczna Gospodyni" took the form of a spread, well-illustrated pamphlet. The publisher of the Łandau magazine focused children's fashion. The main profile of this women's supplement was children's fashion combined with women's salon clothes (Praktyczna Gospodyni, 1907).

The characteristics of the magazine "Praktyczna Gospodyni" as a publication-supplement of fashion changed and underwent Western European influence (Kmieciak, 1980, p. 238), because the magazine distributed samples of European fashion salons among Polish women and children. Western European models of rich clothing were presented, first of all, from Paris salon, but were also sometimes borrowed and popularized among the Viennese fashion salons. Sometimes on the pages of the illustrated magazine, the authors added a short description of the pattern, provided by the main publisher for convenience and so that every Polish milliner could sew such clothes. Children's models dominated among the general models of this women's magazine. In the first column, there were illustrations of either children or a mother with a child, dressed in the latest fashion. The addressees of this illustrated edition were not only wealthy women, but also middle-class women and the intelligentsia – teachers, middle-class women, and sometimes wealthy peasant women. This magazine was popular among tailors, as well as among those who knew tailoring, because the detailed description of tailoring in the magazine was expertly done. The issues of the magazine resembled a small, illustrated book, of a small format (half of an A4 page). The publication was published irregularly – several issues of this magazine were published, and later the publication ceased to exist.

During the period of the interwar twenties, another women's fashion magazine was published, which was of a similar character as the above-mentioned fashion magazines. This edition was "Kobieta w domu i salonie". The third magazine dedicated to fashion and similar to the previous fashion magazines was the magazine of the interwar twentieth year "Kobieta w domu i salonie", which focused on "women's affairs" and was a supplement to "Gazety porannej" in 1925" (Historia prasy polskiej. Prasa polska, 1864 – 1918, p. 124). "Gazety poranna" was an illustrated weekly magazine for the Eastern Kresas. Her application was submitted separately in the columns of the main magazine. The magazine was published regularly. In the title, the entire edition and the addressee are given" (Jarowiecki, 2008, p. 347). The magazine was not intended for rich women. Along with a leading profile of the fashion publication, the second important issue of the magazine was practicality – economic sections for women's domestic work (Dormus, 2016, p. 89). This magazine was of an entertaining character and a light, cheerful tone in many publications.

On the first page, the editors publish the article “Instead of an Introduction – a Conversation” by J. P., in which he moved away from the templates of the construction of women’s publications. Instead of an editorial, the editors published a separate section of “Conversations”: “We publish the first issue of a weekly magazine for young ladies. Therefore, it is necessary to start according to tradition with the content and tasks of the magazine. But we don’t want to make templates and instead of a boring introduction, we invite you to talk” (*Kobieta w domu i salonie*, 1925, No 1, p. 1). In this material, the editors demonstrated a departure from the general trends in the construction of issues of a women’s magazine. The “Conversations” section was close to female readers, because it had a characteristic cheerful, entertaining tone of publications. The traditional sections of this magazine were: “Fashion in Our Country and the Wider World”, which informed readers about fashion news and presented illustrations of women’s clothing; hygiene section, which combined articles on the topics of women’s health, cosmetics, and appearance care; a business column that printed letters from female readers to the editor and answers-advice, cooking recipes. Feuilletons were often published in the magazine’s columns, which gave the magazine a cheerful tone. In Issue 3, an article about the Warsaw theatre was presented, which broke a general, entertaining tone of the publications. It was a long, expertly written article that familiarized the readership with theatrical problems (*Kobieta w domu i salonie*, 1925, No 3). The magazine’s columns featured a topic on physical education of women (*Kobieta w domu i salonie*, 1925, No. 6), which aimed at popularizing a healthy lifestyle for women.

On Page 1 of Issue 8, the editors announced that the supplement was a weekly magazine edited by Yanina Kozak-Pelenska. The traditional “Conversation” section of this issue of the magazine promoted the idea of the importance of physical culture. Physical education, hardening of the body – it was the motto under which female education should be popularized. The economic department “Advice and Economic Instructions” was traditional. There were also published feuilletons, articles about an ascetic life of the Polish women. The article “From the Sphere of Fashion” presented the best illustrations of Western European clothing (*Kobieta w domu i salonie*, 1925, No 8).

In Issue 9, the publication published two articles on the history of the women’s movement: “The Social Role of the Union of Peasants” and “From Daily Work to Freedom” (*Kobieta w domu i salonie*, 1925, No 10). Articles about the women’s movement and political activism were exceptional in the magazine’s columns. More and more, the editorial office covered an important issue – trade in live goods, i.e. girls who ended up with pimps because they were looking for a better job. The editors introduce a new section “Wardrobe for Children” (*Kobieta w domu i salonie*, 1925, No 22), which presented the best models of children’s clothing and the section “Children’s Education”. The publication focused on fashion as the main profile, but in its columns, you can find political articles about women’s equality. For example, in the 22nd issue, the editors printed the article “On the Equality of Women in Professional Work”, which raised an important problem – discrimination of women’s work and the big difference between women’s work and men’s work. The difference in professional work was not a simple coincidence, on the contrary, it was a big problem related to the prejudiced attitude of employers towards women’s work (*Kobieta w domu i salonie*, 1925, No 22, p. 4).

The editors began to inform their readers about fashion and clothes worn abroad in the column “What Clothes Do the Fashionable Women’s World Wear” (*Kobieta w domu i salonie*, 1925, No. 22, p. 6). It was a section of foreign news, but with detailed descriptions and illustrations of fashionable clothes from Western European women’s magazines. After

analyzing several issues of this publication-supplement, it can be confidently stated that it was a fashion magazine that was influenced by previous editions, as well as Western European women's magazines. Fashion was the main profile of this magazine, although the topic of women's equality and political activism was no less important.

Another magazine "Mody kobiecy", which was published in Lviv in 1933, had precisely such sections. "The regularity of the magazine was not determined, but several issues were published. Among the main editorial departments are the following: economic, in which the editors provided answers to the questions of their readers, culinary recipes, a department of informational news of a local nature (it was similar to gossip), as well as a large fashion department. The magazine's fashion section is leading, and political articles are rarely submitted. It occupied a significant part of the publication itself, because it contained the best-illustrated examples of fashionable clothing from various salons and a detailed description of the cut" (Jarowiecki, 2008, p. 237).

**The Conclusion.** The Polish women's fashion publications: "Mody paryskie" (1895 – 1902), "Nowe mody paryskie" (1890 – 1913), "Kobieta w domu i salone" (1925), "Mody kobiecy" (1933), "Praktyczna Gospodyni" have common features: 1. the main profile – fashion; 2. the audience – young women; 3. Western European models of fashionable clothing; 4. artistic and literary articles in the columns of all publications; 5. the political influence of Western European fashion magazines, which was expressed in political publications and the topic of women's equality.

These magazines were the forerunners of today's fashion industry and fashion magazines. They established the tradition of modern fashion publications in Poland. Polish women's fashion magazines focused on European clothing models, although they did not lose their national identity. Women's fashion magazines underwent evolution and transformation: from simple fashion pages to the pages of other publications; from supplements, with an improper design, to magazines of separate, independent publications with well-illustrated clothing supplements, political, problematic articles. An important feature of these magazines was their popularization of men's clothing and the Polish folk clothing; samples of embroidered fabrics, children's clothes, fashionable shirts, embroidered in a new way. These magazines were published in colour, bright (women's magazines were published in black and white). In addition to the main profile of the publication – fashion, magazines published a large number of articles on political topics; as well as articles about theatres, art, and culture, which shows, however, that journalists tried to form an aesthetic taste in their audience, to cultivate love of beauty, and to form an active and politically conscious woman. Femininity, aesthetics, beauty are the main features of Polish women's fashion magazines at the end of the 19th and the beginning of the 20th centuries, which were published in Lviv and other European cities.

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## TRADITIONAL FOLK WOMEN'S CLOTHING OF WESTERN VOLYN

**Abstract.** *The purpose of the article is to do the research on the complexes of women's clothing in Western Volyn at the end of the 19th and the mid-20th centuries, to characterize the fabric, types of cut and decoration, and to determine their local features. **The Methodology of the Research.** In the research there have been used a number of general scientific and special methods: a typological analysis, comparative and historical, statistical, structural and functional methods, field studies, as well as a direct observation method. **The scientific novelty** consists in the fact that for the first time in the article there have been collected and systematized the materials from archival, published, expeditionary and museum sources regarding the traditional clothing of Western Volyn of the end of the 19th – mid-20th centuries; its local features have been determined; new terminology has been introduced into scientific circulation; the geographical boundaries of certain phenomena distribution have been specified. **The Conclusion.** The folk clothing of Western Volyn, despite transformation and modification that took place at the end of the 19th century – at the beginning 20th century, retained its special flavour. One of the defining features of the clothes in the region under analysis is the colour of embroidery, namely black. The tradition of black-embroidered shirts covers Sokal, Ivanychi, Volodymyr-Volynsky and Horokhiv districts of Volyn region, as well as a significant part of Hrubieszów*

*Povit of Lublin Voivodeship of the Republic of Poland, which indicates the inexpediency of using the names "Sokalski" and "Nadbuzhanski". One more local feature is long folding collars on women's shirts. As for women's waist clothing, the most characteristic were skirts sewn from a striped cloth in narrow blue-white longitudinal and transverse stripes, under a local name – "valyvka". In Western Volyn waistbands were in the form of striped narrow edges. In the first half of the 20th century, among women's chest clothing, in addition to "corsets", "staniky" and "shnurovytsi" (laces), "kamizelky" (vests) were spread. Among women's outerwear, it is worth noting samples that arose under the influence of an urban fashion – "syvaky", "kosachky", "sachky", "pinzhaky".*

**Key words:** Western Volyn, traditional clothing, body clothing, waist clothing, chest clothing.

## ТРАДИЦІЙНИЙ НАРОДНИЙ ЖІНОЧИЙ ОДЯГ ЗАХІДНОЇ ВОЛИНИ

**Анотація. Мета статті** – дослідити комплекси жіночого вбрання Західної Волині кінця XIX – середини XX ст., охарактеризувати матеріали, типи крою та оздоблення, визначити їх вузько локальні особливості. **Методи дослідження.** У дослідженні використано низку загальнонаукових і спеціальних методів: типологічного аналізу, порівняльно-історичного, статистичного, структурно-функціонального, польових досліджень, а також безпосереднього спостереження. **Наукова новизна** полягає у тому, що у статті вперше зібрано і систематизовано матеріали архівних, друкованих, експедиційних і музейних джерел щодо традиційного одягу Західної Волині кінця XIX – середини XX ст.; визначено його локальні особливості; до наукового обігу введено нову термінологію; уточнено географічні межі поширення певних явищ. **Висновки.** Народний одяг Західної Волині, попри трансформації та модифікації, які відбулися наприкінці XIX – на поч. XX ст, зберіг особливий колорит. Однією з визначальних ознак натільного одягу аналізованого регіону є колір вишивки, а саме – чорний. Традиція чорновшитих сорочок охоплює Сокальський, Іванічівський, Володимир-Волинський і Горохівський райони Волинської області, а також значну частину Грубешівського повіту Люблінського воєводства Республіки Польща, що вказує на недоцільність вживання назв "сокальські" та "надбужанські". Наступна локальна ознака – довгі відкладні коміри на жіночих сорочках. Щодо жіночого поясного одягу, то найбільш характерними були спідниці, пошиті зі смугастого полотна у вузькі синьо-білі поздовжні та поперечні паси, які мають локальну назву – "валивка". Пояси на Західній Волині були у вигляді смугастих вузьких крайок. Серед нагрудного жіночого одягу, окрім "горсетів", "станіків" та "шнуровиць", у першій половині XX ст. поширюються "камізельки". З-поміж верхнього доцільно назвати зразки, які виникли під впливом міської моди – "сиваки", "косачки", "сачки", "пінжаки".

**Ключові слова:** Західна Волинь, традиційний одяг, натільний одяг, поясний одяг, нагрудний одяг.

**The Problem Statement.** Modern researchers of folk clothing of the Ukrainians divide the ethnographic region of Volyn into three large parts: Western, Central and Eastern (Chaikovska, 2012, p. 94). Western Volyn covers the south-western part of Volyn Region, the northern part of Lviv Region, as well as Biłgorajski and Tomaszów Povits of Lublin Voivodeship of the Republic of Poland.

At the beginning of the 21st century the study of folk clothing of local areas and even individual settlements is particularly relevant, which is due to the need to study regional aspects of the Ukrainian history and ethnology (Mytrofanenko, & Domaransky, 2023, p. 263). The research focuses on the traditional clothing of the Ukrainians in Western Volyn. This aspect of an everyday life was the research focus of scholars of different periods, therefore, in the context of the study, the researches from the middle of the 19th century to the beginning of the 21st century have been taken into consideration.

The research has been done on the basis of archival, published, expeditionary and museum sources. The analysis of the issues related to the study of the folk clothing of the Ukrainians in Western Volyn at the end of the 19th – mid-20th centuries is based on the materials of field research collected in the territory of modern Volyn and Lviv regions during the period of

2010 – 2023. In the process of the research, exhibits from museum and private collections, archival materials, printed sources, and Internet resources were used.

The samples of clothing from the museum collections of Volyn Regional Museum of Local History, National Centre of Folk Culture “Museum of Ivan Honchar”, Novovolynsk Historical Museum and Sokal Historical and Local History Museum also served as a source base.

**The Analysis of Recent Research and Publications.** A special role in the study of the national clothing of the Ukrainians belongs to the Imperial Russian Geographical Society, founded in 1845, whose members were many outstanding Ukrainian scholars. P. Chubinskiy was a member of this society, a well-known Ukrainian ethnographer, who, as a result of his own field research, published seven volumes of the “Works of Ethnographic and Statistical Expedition to the Western Russian Region by the Imperial Russian Geographical Society”, which contains a description of the folk clothing of various regions, in particular the inhabitants of Volyn (Chubinskiy, 1872; Chubinskiy, 1877).

In the context of this research, the articles on the folk clothing of Volyn inhabitants, published in “Ethnographic Collection of the Imperial Russian Geographical Society”, “Volyn Provincial Gazettes”, “Chernihiv Provincial Gazettes”, the magazines “Zhyvaya Starina” and “Proceedings of the Society of Researchers of Volyn” are of a considerable interest.

Valuable pieces of information is contained in the works of Polish researchers, in particular “Dzieła wszystkie. T. 36: Wołyń” by O. Kolberg (Kolberg, 1972), “Wspomnienia Polesia, Wołynia i Litwy” by Yu. Kraszewski (Kraszewski, 1840), “Powiat Sokalski pod względem geograficznym, historycznym i ekonomicznym” by B. Sokalski (Sokalski, 1899).

A significant contribution to the study of folk clothes of the Ukrainians was made by Khv. Vovk, an anthropologist, ethnographer and archaeologist. In the works “The Ukrainian People in their Past and Present” (Volkov, 1916, Vol. 2, pp. 543–595) and “Studies in Ukrainian Ethnography and Anthropology” (Vovk, 1995, p. 170) a valuable description of the national costume of the Ukrainians of various ethnographic regions of Ukraine, which is typical of researchers of the 19th century, is presented, a thorough analysis of clothing elements is carried out on the basis of comparisons, common and distinctive features of the clothing of the Ukrainian population of various regions, including Volyn, are traced.

Brief information about folk clothing in Volyn is found in the works of H. Stelmakh, T. Kosmina, K. Mateiko, T. Nikolayeva, etc.

The works by H. Stelmashchuk “Ancient Clothing in Volyn” (Stelmashchuk, 2006) and V. Malanchuk “Some Features of Peasant Clothing, Embroidery and Artistic Weaving in Sokal Region” are also of a special interest in the research context (Malanchuk, 1964, p. 5).

Information about the Volyn clothes is found in the eighteen-volume album of photo materials “Ukraine and the Ukrainians” (Ukraina y Ukraintsi, 2006) from the stock collection of the National Centre of Folk Culture “Ivan Honchar Museum”, compiled by I. Honchar.

Important informative sources are the works by H. Stelmashchuk “Traditional Headdresses of the Ukrainians” (Stelmashchuk, 1993), as well as by M. Bilan and H. Stelmashchuk “Ukrainian Clothes” (Bilan, 2000), the publications by V. Vynnychuk “Ornaments in Embroidery and Weaving in Volyn” (Vynnychuk, 2004), by I. Ihnatiuk “Folk Clothes of the Ukrainians in Chelm and Pidliashshia Region” (Ihnatiuk, 1997, pp. 177–213), by T. Shparaha “On Regional Features of Women’s Clothing in Volyn” (Shparaha, 2004), by V. Bezpalko “Materials for the Outerwear Manufacture of Ukrainian Peasants of the Second Half of the 16th Century (According to Official Sources of Volyn)” (Bezpalko, 2017) and the others.

In the thorough work by L. Ponomar "Folk Clothing of Right Bank Polissia of the mid-19th – mid-20th Centuries. Historical and Ethnographic Atlas. Dictionary" (Ponomar, 2015) and the research of A. Dmytrenko "Collection of Clothes from Kovel Region in Volyn Museum of Local Lore" (Dmytrenko, 2013), "Artistic Solution of Volyn Women's Shirts (from the Funds of Volyn Museum of Local History)" (Dmytrenko & Andrusyk, 2015), "Attributive Signs of Women's Shirts of Volyn and Western Polissia in the Works of Researchers of Traditional Clothing" (Dmytrenko, 2017) there is information about the clothing of the population of Western Polissia bordering on Western Volyn. This makes it possible to follow the parallels in the use of folk clothing in the neighbouring territories.

**The purpose of the article** is to do the research on the complexes of women's and men's clothing of Western Volyn at the end of the 19th – mid-20th centuries, to characterize the fabric, types of cut and decoration, to determine their specific local features.

**The Results of the Research.** In the second half of the 19th century residents of Western Volyn used local raw materials to create clothes and shoes mostly: flax, hemp, wool, wood, straw, and animal skin. Most often, these were linen cloth and woolen cloth, woven by Volyn women.

At the end of the 19th – at the beginning of the 20th century in the manufacture of clothes, factory-made fabrics began to be used more actively, in particular cotton and linen factory fabrics of various types, coloured and ornamented cotton, satin, manufactured cloth, velvet, etc. Woolen, silk and satin ribbons, coloured cords, hand-made and factory-made lace, white and coloured cotton threads, braid, glass and pewter buttons, metal cufflinks with coloured glass inserts were used to decorate the elements of the outfit. At the time, the influence of urban clothing on the peasant outfit becomes noticeable.

At the end of the 19th – the beginning of the 20th century the complex ensemble of women's traditional outfit of Western Volyn included: body wear, chest outfit, outerwear, waistbands, hats, shoes and jewelry.

### ***Body Clothes***

In Western Volyn women's shirts were sewn from home-spun linen or factory-made cotton or linen fabric. For festive shirts, bleached cloth of the best quality was used, for everyday ones, accordingly, of the worst quality. The shirt was sewn from two cloths – front and back, because the width of a local cloth was sufficient to avoid using the third cloth, which was a common phenomenon in the neighbouring Polissia, where narrower cloths were used. The length of the shirts was shortened and reached the middle of the thigh and was never visible from under the loincloth. This feature is observed in neighbouring Opillia and Western Polissia. Despite this length, there were both separate shirts and shirts with a sewn-on lower part – "pidtochka", for the sewing of which less bleached and coarser cloth was used.

At the end of the 19th century in Western Volyn, women's shirts with a gusset cut were used, where the gusset (a shoulder gusset) was sewn to the cloth. The sleeve was sewn from one cloth and ended with a cuff or frills. A must-have constructive detail of the shirt was a square insert, which was sewn between the sleeve and the waist and made it possible to move hands more freely. Quite often, a square insert was cut from the same cloth as a sleeve.

Embroidered shirts which date back to the 19th – the beginning of the 20th century are mostly decorated with factory cotton threads – the techniques "cross", "shtapivka" and "lichylna hlad". The colour of the embroidery of these shirts was mostly black, which makes it possible to distinguish the outerwear of Western Volyn from among the others. In recent decades, such shirts have received the name "sokalsky" in the society, which is not correct, because it limits the territory of use of these shirts only to the administrative



boundaries of Sokal district of Lviv region, and in fact, the geographic limits of the spread of this phenomenon include, in addition to Sokalsky, also Ivanychivsky, Volodymyr-Volynsky and Horokhivsky districts of Volyn Region, as well as a significant part of Hrubieszów Povit of Lublin Voivodeship of the Republic of Poland, where from time immemorial and before the events of the “Vistula Operation” of 1947, Volyn Ukrainians lived compactly. It is also inappropriate to use the term “Nadbuzhanski shirts”, because the tradition of black-embroidered shirts covers only a part of the Zakhidny Buh river basin.

At the beginning of the 19th century, and especially in the 20s and 30s of the 20th century red and yellow colours are added to the basic black colour of the embroidery, and from about the 30s and up to the mid-20th century embroidery becomes polychrome. During the mentioned above period, peasants increasingly began to use factory-made cotton and linen fabrics instead of home-spun linen.

The inset, sleeve, cuffs or ribbing, occasionally the armpit incision, as well as the collar were decorated with embroidery. On the shirts of the 19th century sometimes there are geometric ornaments, but at that time the dominant one was a floral “brocade” embroidery, which spread from the mid-19th century.

The principles of arrangement of ornaments remained traditional until the period between the two World Wars – a stripe was embroidered on the collar, under the collar, on the sleeve – an embroidered vase-tree or a scattering of flowers in a checkerboard pattern, sometimes there is embroidery on the wrist above the cuffs or ripples. Sometimes you can see three embroidered horizontal stripes of geometric or floral ornament on the cuff and sleeve.

Based on the analysed samples of women’s clothing from Western Volyn, it can be concluded that the axillary incision was mostly in the middle, occasionally it was shifted to the left. There are often shirts with a stylized placket formed from the linen to the right of the armpit cut. Such a conventional ribbon can be unembroidered or embroidered with a floral or geometric ornament, has slotted loops and is fastened with metal, horn-shaped or glass buttons of various colours.

The most common collars on women’s shirts of the region were long turn-down collars, the length of which could reach about 20 cm (Appendix 1, 2). They are characteristic only of Volyn shirts and are not characteristic of any other ethnographic region of Ukraine. Such collars gave the shirt a special expressiveness and recognition from among the embroidered shirts of Ukraine. Along the perimeter, they were embroidered with floral, geometric, and sometimes calligraphic ornaments. They often sewed two rows of “shtapivka”, sometimes there was made a small needle lace. Mandarin collars were occasionally used, and in the 20s and 30s – without a collar and there was a small lining.

The cuffs on women’s shirts were quite wide, up to 10 cm wide. As on the collars and cuffs, “shtapivka” was made along the perimeter, and the base of the cuff had a geometric or floral ornament. The edges could have braided needle lace. The ruffled end of the sleeve could be adjusted using the “prutyk” technique and decorated with a narrow strip of ornament.

### ***Waist Clothing***

In the second half of the 19th century in Western Volyn, sewn forms of women’s clothing continued to be used. These were skirts sewn from several sheets of home-spun fabrics. In various sources, there are the following names for these skirts: dymka, chystoch, litnyk, apron, vartukh with a bolf, kolman, randak, spudnytsia, etc. The raw materials for them were flax and wool, respectively, there were linen, woolen and semi-woolen fabrics, where the basis was linen threads, and the weft was woolen. Dyes of a natural origin were used for

dyeing threads, which were completely replaced by aniline counterparts at the beginning of the 20th century.

The most characteristic were skirts sewn from a striped linen in narrow blue and white longitudinal and transverse bands. Sometimes such a skirt was decorated with red woven stripes in a lower part of a skirt. In the villages of Sosnyna, Ivanychi and Bubniv, Volodymyr-Volynsky districts, we managed to find such a model of the end of the 19th – the beginning 20th century and fix a local name – “valyvka” (Appendix 3). The length of “valyvka” is 105 cm, at the waist it is pleated, except for the front part, which contains a cut and there was necessarily a home-made zapaska (an apron with a star-shaped trim).

At the end of the 19th – the beginning of the 20th century factory-made fabrics were used actively. Therefore, waistband clothes made of home-made fabrics fell out of use gradually, and skirts made of calico, satin, a thin woolen factory fabric, etc., took their place. In terms of a cut, these waistband clothes resembled samples of homespun fabrics: densely pleated at the waist, with a slit and no pleats in the front, but the difference was in length – they were much shorter than their predecessors. Quite often, such skirts were decorated with an appliqué in the form of several horizontal coloured ribbons, occasionally wealthier peasant women used pozument. Mandatory for such skirts was an apron made of factory fabric, decorated with embroidery or an appliqué.

#### ***Zapasky (aprons with a star-shaped trim).***

An indispensable element of women's complex outfit of Western Volyn was an additional waistband clothing – zapaska – a rectangular single-clothing, sewn from a woven piece of home-made fabric, the basis of which was linen threads, and the weft was finely spun woolen threads (Appendix 4).

In the upper part of zapaska there were several folds and a sewn narrow linen band, to which there were attached, in turn, linen laces or narrow woolen strips, with the help of which zapaska was fixed on top of the main waistband clothing. There was a simple seam in the lower part.

Zapaska had narrow multi-coloured (black, red, yellow, green, blue, white, orange, etc.) stripes alternating with each other across. There were wider main colour stripes in the lower part.

#### ***Aprons***

At the beginning of the 20th century a home-made zapaska became a thing of the past, and was replaced by aprons sewn from factory cotton and linen fabric. They were sewn from one rectangular cloth, pleated in waistband, and at the bottom they were decorated with a lace of home or factory production, sometimes peasants made tassels from the threads of the cloth base (Appendix 5). Embroidered aprons were spread on both sides of the Western Buh River and had a number of common features.

In some places, the ancient name “zapaska” was preserved to denote an apron made of factory fabric. Such aprons were mostly embroidered in the “cross” technique and occasionally “plain” in cotton, sometimes silk threads. Plant ornaments were dominant, sometimes in combination with geometric ones.

#### ***Kraiky***

In Western Volyn, as well as in other neighbouring parts of the region, waistbands were in the form of striped narrow edges, made on a loom in the technique of a simple linen weaving (Appendix 6). Sometimes there were samples made in an “overflow” technique. Such edges were multi-coloured, but the main colour was red, complemented by splashes of black, yellow, green, blue, white, orange, etc. The edges ended with twisted tassels formed from the warp threads.

### ***Chest clothing***

Sleeveless chest clothing is of a rather late origin and arose under the influence of pan-European urban fashion. It was worn directly over the shirt and complemented the silhouette of the Volyn folk clothing of the period under analysis.

Sleeveless chest clothing were represented by vests and corsets of several types: “horset”, “stanik”, “shnyrovytsia” (Chaikovska, 2012, p. 74). The front pleats were fastened with buttons and slotted loops or hooks. The back was mostly solid and widened with wedges. Some of them have the so-called “tongues” – round flaps that were sewn along the waist.

The analysed samples indicate that the majority of sleeveless chest clothings were sewn by a sewing machine. Mostly factory-made cotton and semi-wool fabrics were used: velvet, satin, chintz, etc. The most common were black, blue, green, burgundy, etc. colours. Sleeveless shirts had a lining, which was cut mainly from home-spun linen. They were decorated with an appliqué made of velvet, pozument or factory braid.

In the first half of the 20th century there appeared slightly different “kamizelky” (vests) (Appendix 7). They were somewhat longer when compared to the samples of the 19th – the beginning of the 20th century. The main fabric was mainly velvet, although there are samples made of factory woolen and cotton fabric. The lining was a home-spun linen cloth. The main difference of such vests was not only in the length, but also in the way of decoration – a widespread embroidery with beads and threads using a “plain” embroidery technique. In some villages, especially in the vicinity of a modern town of Novovolynsk, such vests were used until the middle of the 20th century and were used during the wedding ceremony.

### ***Footwear***

At the end of the 19th – at the beginning of the 20th century, in the territory of Western Volyn, during the warm season people walked barefoot. On cooler days and bad weather three types of shoes were used: woven from tree bark, wrinkled from animal skin, and sewn.

The most archaic footwear of the region are postols woven from tree bark, which were mostly found in the north of the territory under analysis, on the border with Polissia, where woven postols were the most common among other regions of Ukraine. The legs were wrapped with cloths – pieces of home-spun or woolen fabric, depending on the air temperature, they were fixed with the help of drags – linen laces.

Leather soles are a type of tight shoes made of thick, but soft cow or pig rawhide, which were sewn from one piece of leather, blunt or pointed, depending on the place and nature of tightening or stitching of individual parts of the sole (Nikolaeva, 1987, p. 74). We learn about postols made from animal skins from archaeological excavations, in particular from the battlefield near Berestechko during the national liberation war of the Ukrainian people led by B. Khmelnytskyi. However, field research and museum samples do not give us an idea of wrinkled leather shoes of the period of the second half of the 19th – the first half of the 20th century. Longer, sometimes up to the mid-20th century, this type of footwear was found in Podillia, which is close to Volyn.

Sewn footwear includes boots and shoes made by local craftsmen. Heeled boots with long freebies stilettos in different colours were especially popular.

In the 1920s and 1930s, when the region was part of the Second Polish-Lithuanian Commonwealth, factory-produced shoes of the European type became widespread.

### ***Hairstyles and hats***

In warm season, girls went with their heads uncovered, braiding one or two braids, in cool season they wore a kerchief. In Volyn, as well as in other regions of Ukraine, married women always covered their heads.

At the end of the 19th – at the beginning of the 20th century, in Volyn, various types of women's headdresses were common – cap-like *chiptsi*, towel-like *namitky* made of different types of cloth, woven kerchiefs.

It was possible to record and study only a few of the main women's headdresses outfits in the areas under research. These are kerchiefs made of home-spun linen (the village of *Lytovezh*, *Ivanychi* district) and manufacturing production. The absence of cap-like and towel-like headdresses in museum collections indicates that they fell out of use at the end of the 19th century.

A home-made kerchief was of a rectangular shape, was woven from home-spun linen threads, and along the perimeter was ornamented with tassels made of red factory cotton threads.

Kerchiefs of manufacturing production were different in size and colour pattern. Manufactured kerchiefs with embossed ornament were used.

### ***Jewelry***

In Western Volyn the most common necklace was a coral necklace of various shapes and sizes. The poorer population used the so-called "stone" (smalt) necklace of different colours, different shades of red mostly (*Vrochynska*, 2008, p. 39). A necklace made of multi-coloured blown and cast glass was also popular.

Residents of Western Volyn also used a variety of jewelry. These are mostly silver, and occasionally gold, earrings, crosses, various rings.

### ***Outerwear***

Outerwear of the Ukrainians was of two types: autumn-spring and winter. A special group includes raincoat clothing, which was worn on top of the first two types in bad weather conditions (*Nikolaeva*, 1987, p. 54).

Animal skins, home-spun cloth and linen were used for sewing outerwear. The cloth was usually the natural colour of sheep's wool: brown, white, gray and black (*Mateiko*, 1977, p. 97). The same can be observed in the previous eras (*Shkolna*, *Timoshenko*, 2023, p. 21).

At the beginning of the 20th century the most common examples of autumn-spring clothing were *svyty*, *semrags*, *syvaky* and *kosachky* in Western Volyn.

The traditional *svyta* was made of brown home-spun cloth. It had a straight back and widened downwards with side wedges that folded into folds along the waist line. The sleeves were straight, the collar mostly had the appearance of a stand, sometimes it was sewn with a fold-down collar.

*Semrags* were similar to suits, which were also sewn from home-spun cloth, usually brown in colour. They were straight-backed and flared downward with wedges, but had no pleats. *Semrags* were decorated with velvet appliqué and ribbons on hems and sleeves.

At the beginning of the 20th century in the territories of Sokal District of Lviv Region, *Ivanychi* District of Volyn Region, as well as *Hrubieszów* Povit of Lublin Voivodeship of Poland, *syvaky* were widespread. This is a female outerwear of a late origin, which arose under the influence of urban fashion. They were much shorter, if compared with suits and *semrags*, a jacket design, but were sewn from a homespun cloth of a gray colour, from which they got their name (the villages of *Lytovezh*, *Zabolottsi*, *Zastavne* of *Ivanychi* district). They were decorated with an appliqué in the form of velvet stripes on hems, bottom, sleeves.

A rather interesting sample of short women's outerwear made of home-spun cloth were "kosachky", which were worn in the suburbs of *Volodymyr*. They were mostly sewn from brown cloth, decorated with factory cloth, braids, *pozuments*, curls of various colors. One example of such a *kosachka* was found in the village of *Bubniv*, *Volodymyr-Volynsky* district (Appendix 8).

The main form of winter outerwear of the Ukrainians in Volyn, as well as in other regions of Ukraine, and among neighbouring peoples, was a coat kozhukh (Mateiko, 1977, p. 114). In the territory under analysis, there were long, straight-backed white coats kozhukhy that were wider downwards with the help of side wedges with a large folding collar or a low stand-up collar. They were replaced by shortened coats kozhukhy of a dark other colour, an active use of which is the period of the 20s and 30s of the 20th century. Kozhukhy coats were decorated with an appliqué with stripes, ribbons, curves on hems, around wrists and pockets, sometimes they were embroidered with woolen or cotton threads with the seam “goat”, “cross”, etc.

In Western Volyn, and especially in the Galician part, the so-called poltnianka was worn. According to the method of cutting, they had several forms – straight-backed, single-sided; flared single- and double-sided; with a cut-off back and thick gatherings (Chaikovska, 2012, p. 73). They were decorated with an appliqué, using a blue cloth and cords of blue, red, yellow colours, etc.

In the middle of the 20th century old models of outerwear went into the past, they were replaced by “sachky”, “jackets” of dark colours, which appeared under the influence of an urban fashion.

**The Conclusion.** Folk clothing of Western Volyn, despite transformation and modification that took place at the end of the 19th century – at the beginning 20th century, kept its special colour owing, above all, to a black colour in embroidery of women’s shirts. Although a large assortment of cotton threads for embroidery of various colours appears during the period under analysis, shirts, despite a polychrome embroidery that replaced a monochrome one, did not lose their face and a clear narrow local specificity, on the contrary, they were enriched with new techniques and ornaments, which makes it possible to distinguish them from other examples of body clothing of a large ethnographic and historical region – Volyn.

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### Illustrations



**Appendix 1. Women’s embroidered shirt. Sokal District, Lviv Region.  
The beginning of the 20th century**



**Appendix 2. Women’s embroidered shirt. Lytovezh village, Ivanychi District,  
Volyn Region. The end of the 19th – the beginning of the 20th century**



**Appendix 3. Home-made skirt «valyvka». The village of Bubniv, Volodymyr-Volynsky District, Volyn Region. The end of the 19th century**



**Appendix 4. Homemade zapaska. The village of Sosnyna, Ivanychi District, Volyn Region. The beginning of the Start 20th century**



**Appendix 5. Embroidered zapaska. Lytovezh village, Ivanychi District, Volyn Region in 1920 – the 30s**



**Appendix 6. Kraika. The village of Stara Lishnia, Ivanychi District, Volyn Region. The end of the 19th – the beginning of the 20th century**



**Appendix 7. Sleeveless women’s “kamizelka” (vest). Lytovezh village, Ivanychi District, Volyn Region in 1920 – the 30s**



**Appendix 8. Women’s outerwear “kosachok”. The village of Bubniv, Volodymyr-Volynsky District, Volyn Region. The end of the 19th century**

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**EDUCATIONAL AND SCIENTIFIC DIMENSIONS OF AGRICULTURAL MECHANICAL SCIENCE AT KYIV POLYTECHNIC INSTITUTE (1898 – 1929): INSTITUTIONAL TRANSFORMATIONS, PERSONALITIES, ACHIEVEMENTS**

**Abstract.** The purpose of the article is to highlight the main milestones of establishment, development and activity of academician P. M. Vasylenko Department of Agricultural Machines and System Engineering of National University of Bioresources and Nature Management of Ukraine during the first twenty years of its operation, initially a subdivision of Kyiv Polytechnic Institute (1898 – 1922), and then as a structural subdivision of Kyiv Agricultural Institute (1922 – 1929) through the prism of personalized achievements of lecturers and employees regarding the establishment and development of domestic agricultural engineering and testing systems of agricultural machinery for agricultural needs, expansion of archival searches of students and followers of the Department founder – Professor K. H. Schindler; and their creative achievements in the field of industry science and education. **The Research Methodology.** The article is based on general scientific – analysis, synthesis, classification and historical methods – problem-chronological, comparative and historical, retrospective. Chief focus was on the biographical method as a means of reconstructing the creative work of scholars who made a significant contribution to ensuring scientific and educational activities of the Department. **The scientific novelty** of the research consists in elucidating the formation process significance of one of the first departments of the educational institution in relation to its projected modern European future through the formation and representation of the best representatives' achievements of the time in the field of industry education and science, who deserve to be immortalized in the pantheons of the Ukrainian memory. **The conclusions** relate to the period of 1898 – 1929 in the history of the modern NUBiP of Ukraine in general and especially after K. H. Schindler was removed from the position as Professor at KPI, Dean of the Mechanical Department, Head of Kyiv Station for testing agricultural machines and tools and, of course, Head of Department in 1911. It is for the first time in the modern history of Ukraine that an attempt has been made to bring historical justice to the figure of Professor O. O. Khokhriakov as the head of the Department in 1911 – 1912 and to determine that after him, during the period of 1912 – 1915, the Department was initially headed by Professor P. R. Sliozkin and clarify



that he had not been in charge since 1911, and from 1915 to 1924 – Professor L. P. Kramarenko was the head of the Department. In addition, to elucidate the previously unknown pages in the Department activity in the field of branch science from the end of 1924 to October of 1929, its Head – Professor P. F. Yovk. The focus is on the participation of employees of the Department of Mechanical Science and Mechanical Engineering at KPI in the establishment and activities of the leading creative associations, in particular The Kyiv Agronomic Society, which became the first and the only specialized scientific society during the imperial era in the history of Ukraine and the forerunner of the Agricultural Scientific (later – Scientific) Committee of Ukraine, which, in turn, through the Scientific Advisory Council at the National Research Council of the UkrSSR from May 22, 1931, in the form of All-Ukrainian Academy of Agricultural Sciences became the forerunner of modern National Academy of Agricultural Sciences of Ukraine. The lack of reliable archival documents made it impossible to reproduce a comprehensive and balanced contextual picture of the course of all events and facts with a full personalized content in the extracts for the sake of the future of one of the most effective and innovative areas of industry research of the second half of the 19th – the beginning of the 20th centuries – domestic agricultural engineering and testing of agricultural machinery for its needs.

**Keywords:** Kyiv Station for testing agricultural machines and tools, scholar, agricultural production, agricultural engineering, educational process, agricultural research, agricultural machinery.

### ОСВІТНІЙ ТА НАУКОВИЙ ВИМІРИ СІЛЬСЬКОГОСПОДАРСЬКОГО МАШИНОЗНАВСТВА В КИЇВСЬКОМУ ПОЛІТЕХНІЧНОМУ ІНСТИТУТІ (1898 – 1929): ІНСТИТУЦІЙНІ ТРАНСФОРМАЦІЇ, ОСОБИСТОСТІ, ДОСЯГНЕННЯ

**Анотація.** Метою статті є висвітлення основних віх створення, розвитку і діяльності кафедри сільськогосподарських машин та системотехніки ім. академіка П. М. Василенка Національного університету біоресурсів і природокористування України в перші двадцять років існування спочатку при Київському політехнічному інституті (1898 – 1922), а потім як структурний підрозділ Київського сільськогосподарського інституту (1922 – 1929) через персоніфіковане наповнення здобутків викладачів і співробітників щодо становлення основ та розвитку вітчизняного сільськогосподарського машинобудування, а також системи випробування землеробської техніки для його потреб, розширення архівних пошуків учнів і послідовників її засновника – професора К. Г. Шиндлера, та їхніх творчих звитяг на ниві галузевої науки й освіти. **Методологія дослідження.** Стаття ґрунтується на загальнонаукових – аналіз, синтез, класифікація та історичних методах – проблемно-хронологічний, порівняльно-історичний, ретроспективний. Особлива увага надавалася біографічному методу як засобу реконструкції творчого доробку вчених, які зробили вагомий внесок у забезпечення науково-освітньої діяльності кафедри. **Наукова новизна дослідження** полягає у тому, що доведено вагомість процесу становлення однієї з перших кафедр закладу освіти щодо його прогнозованого сучасного європейського майбутнього через формування та репрезентацію напрацювань кращих тогочасних представників на ниві галузевої освіти і науки, які заслуговують бути увіковіченими на пантеонах пам'яті України.

**Висновки** стосуються періоду 1898 – 1929 рр. в історії сучасного НУБіП України взагалі та особливо після відсторонення в 1911 р. від праці К. Г. Шиндлера в КПІ на посадах професора, декана механічного відділення, завідувача Київської станції з випробування сільськогосподарських машин і знарядь та, зрозуміло, кафедри. Чи не вперше у новітній історії України зроблена спроба внести історичну справедливість стосовно постаті професора О. О. Хохлаєва як завідувача кафедри у 1911 – 1912 рр. і встановити, що після нього протягом 1912 – 1915 рр. її спочатку очолював професор П. Р. Сльозкін та уточнити про керівництво нею не з 1911 р., а з 1915 до 1924 рр. – професора Л. П. Крамаренка. Крім того, ствердити раніше невідомі сторінки в діяльності кафедри на ниві галузевої науки з кінця 1924-го до жовтня 1929 рр. її керманіча – професора П. Ф. Вовка. Акцентована увага на участі співробітників кафедри машинознавства та машинобудування КПІ у створенні та діяльності провідних для свого часу творчих об'єднань, зокрема Київського агрономічного товариства, що стало першим та єдиним спеціалізованим науковим товариством у часи імперської доби в історії України і передвісником Сільськогосподарського вченого (згодом – наукового) комітету України, що, зі свого боку, через

*Науково-Консультативну Раду при НКЗС УСРР з 22.05.1931 р. у вигляді Всеукраїнської академії сільськогосподарських наук став предтечою сучасної Національної академії аграрних наук України. Відсутність достовірних архівних документів унеможливила відтворення всебічної та виваженої контекстової картини перебігу всіх подій та фактів із повним персоналізованим наповненням у звітнях заради майбутнього одного з найефективніших та інноваційних напрямів галузевого дослідництва другої половини XIX – початку XX ст. – вітчизняного сільськогосподарського машинобудування та випробування землеробської техніки для його потреб.*

**Ключові слова:** *Київська станція по випробуванню сільськогосподарських машин і знарядь, вчений, аграрне виробництво, сільськогосподарське машинобудування, освітній процес, аграрне дослідництво, землеробська техніка.*

**The Problem Statement.** For more than 25 years of my historical researches in the field of evolution of domestic branch scientific thought and its organizational foundations on the issues of origin, formation and development of agrarian research, as well as education and technology for agrarian needs, I am convinced of the need to revise the seemingly years-old knowledge, since each system of power, by and large, adjusted everything to its values and, the most importantly, its ideology. As a result, especially when archival documents that were previously unavailable due to the political situation are involved, unexpected facts emerge that force a different interpretation of individual events. The majority of such discoveries relate to the personified filling of ambiguous periods of the Ukrainian history associated with wars, revolutions, repressions, as well as elementary reluctance of scholars to do the research on the course of events thoroughly. Thus, during the preparation of the monograph about an outstanding world-class scholar and educator, Full Professor of Emperor Alexander II Kyiv Polytechnic Institute of (nowadays – National Technical University of Ukraine “Ihor Sikorsky Kyiv Polytechnic Institute”), the founder of the first Kyiv station for testing agricultural machines and agronomic tools in Europe (1900), the Swiss subject K. H. Schindler (1869 – 1940) (Verhunov, 2019; Verhunov, 2021) it turned out that there is a lack of information about his students and followers, as well as information about an objective fulfillment of the outstanding actions by the scholar in the direction of domestic agricultural engineering development and the system of testing machinery for agricultural needs. First of all, there is meant the period of years 1899 – 1911 – the time of K. H. Schindler’s work at KPI on the positions of Professor, Dean of Agricultural and Mechanical Departments, Head of the mentioned above Station. It is clear that he was also the Head of the Department of Applied Mechanics in 1898 – 1899 and Department of Mechanics in 1899 – 1911 at the Agricultural Department, as well as the Head of the Departments of Agricultural Engineering and Mechanical Engineering at the Mechanical Department in 1900 – 1911. Nowadays, the Department is successfully represented at the Mechanical and Technological Faculty of NUBiP of Ukraine under the name M. P. Vasylenko Agricultural Machines and System Engineering Department. Although in a special publication dedicated to the 100th anniversary of its operation, it is written that the Department was established “in 1898 at Kyiv Polytechnic Institute (KPI)” under the name “Agricultural Machinery Department”, and its “first head was a technological engineer by education (later Prof.) K. H. Schindler, who was invited to this position from Moscow Agricultural Institute, which he “had headed it until 1916” (Bulgakov, 1998, p. 42).

As for the fact that the Department was headed by Professor K. H. Schindler, in the historical presentation edition to the 120th anniversary of NUBiP of Ukraine, he is considered its founder “... in 1898 on the basis of the Agricultural Department of KPI ...” and its “... first

head ...” (Kafedra silskohospodarskykh mashyn, 2018, p. 240). On the basis of the archival research, I state confidently that the mentined above fact is not fully true in relation to K. H. Schindler. The same concerns his successors as Heads of the Department, let alone the names of this Department during the period of 1898 – 1929.

In modern history of Ukraine I was the first one to make an attempt to bring historical justice to the figure of Professor P. R. Sliozkin as the Head of the Station since 1911 (Verhunov, 2007), and from 1912 or, as it turned out, after the dismissal of O. O. Khokhriakov, also the Head of the Department. In a series of other publications, I approved for the history of the current Department of Agricultural Machinery and System Engineering named after Academician P. M. Vasylenko of the NUBiP of Ukraine, its first employees: S. M. Bohoyavlensky (Verhunov, 2023d) and M. M. Kahan (Verhunov, 2022), lecturers and heads, Professor K. H. Schindler’s successors: O. O. Khokhriakov (Verhunov, 2023b) and L. P. Kramarenko (Verhunov (a), 2023), and also made important clarifications regarding Professor P. F. Vovk (Verhunov, 2023c). It was the work of these scholars that became the driving force which, during the period of the so-called industrial capitalism in the country (1861 – 1900), made it possible to take a giant step to transfer agriculture from the level of “grandfather’s customs” to commercial agriculture with a globally competitive domestic agricultural industry. It was this Department that subsequently became the main customer of the latest scientific knowledge, skills and training of educated specialists for the agricultural industry, adapted to a specific soil and climate zone.

**The Research Results.** At the end of the 19th century the issue of agricultural production mechanization, including mechanical engineering and machine science, required an urgent solution. Moreover, at that time only 20 universities of agricultural profile operated in the country (Shchoholiv, 1929, pp. 20–21). Emperor Alexander III Kharkiv Practical Technological Institute established in 1885 and Emperor Alexander II Kyiv Polytechnic Institute established in 1898 developed their activities in this direction almost immediately. Kyiv Institution almost immediately became a flagship in the country due to a well-thought-out combination of theoretical and practical principles in the educational process, taking into account the best world experience. Behind all this was the painstaking and well-thought-out activity of a whole galaxy of outstanding scholars and educators of the Institution (as, by the way, at one time in Kharkiv), led by the first director (rector), Professor V. P. Kyrpychov (1845 – 1913). Among them, Professor K. H. Schindler and the Department headed by him played an outstanding generating role.

As for the original name of the Department, I state confidently that at the time of its foundation, under the objective circumstances of the educational process organization peculiarities due to the “University Charter” in tsarist Russia, the word combination “agricultural machines” was not even used. According to the “Regulations on Emperor Alexander II Kyiv Polytechnic Institute” approved on June 8, 1898, Paragraph 1 runs that, among other disciplines, in the curriculum of the Agricultural Department there is the following subject: “Mechanics Adapted to Agriculture” or in the modern sense – Agricultural Mechanics. According to Paragraph 3 of this document, two Departments were established: 1. Theoretical Mechanics and 2. Applied Mechanics. According to Paragraph 6 the Head of the latter was also entrusted with the management of the “Station for the use of steam and other machines and the workshop ...” (Polozhenie i Ustav, 1898). The same was confirmed by the “Statute of Emperor Alexander II Kyiv Polytechnic Institute” signed by His Highness on 07/25/1899 (KSA, f. 18, d. 1, c. 4, pp. 1, 3). By the way, in accordance with Paragraph

5, the Department of Applied Mechanics was allowed to have three laboratory assistants (employees). Since it was not so easy at that time to find a suitable specialist in the country, and even with a scientific degree diploma on the one hand, and on the other hand, Applied Mechanics at the Agricultural Department of KPI had to be studied not from the first year, then the director of KPI, Professor V. L. Kyrpychov, on 16.05.1899 invited to the Institution, upon transfer from Emperor Alexander III Kharkiv Institute of Technology, “a laboratory assistant at the agricultural station K. Schindler ...” to become the Head of the Department of Applied Mechanics or, more precisely, to the position of an acting extraordinary Professor from September 1, 1899 to conduct lectures on “... Mechanics Course at the Agricultural Department and a special course on Agricultural Engineering at the Mechanical Department” (KSA, f. 18, d. 2, c. 289, p. 8). The Council of the KPI adopted the corresponding decision on August 24, 1899 (SAKR, f. 361, d. 1, c. 73, p. 62). Although there is information that at KPI K. H. Schindler began to conduct lectures on the course under the title “Design, Construction and Operation of Agricultural Machines” (Pavlenko, Ruda, Khorosheva & Khramov, 2001, p. 250). Since at the time modern understanding of a department and, even more so, its head did not exist, but the concept of Professor, who heads a department or conducts lectures on a discipline determined by the Council of an educational institution, was present, then, according to its decision dated 05/24/1898 (SAKR, f. 361, d. 1, c. 73, p. 62), instead of Departments of Applied and Theoretical Mechanics, the Department of Mechanics was established at the Agricultural Department. In addition, instead of the Department of Applied Mechanics, the Department of Agricultural Machinery was established at the Mechanical Department of KPI. Under this name, they functioned until 1921, inclusive, and after the unification, they were transferred to Kyiv Agricultural Institute.

On March 18, 1900, after the decision of the joint meeting of the Agricultural and Chemical Department at KPI, and then the Council of the institution on the establishing the Station for testing agricultural machines and tools, K. H. Schindler was appointed its Head with an appropriate payment in accordance with Art. 13 of the KPI Statute. It seems that with the Station foundation in the structure of KPI at the Agricultural and Mechanical Departments since 1900, in the Institution conducting lectures on the discipline “Agricultural Machines and Tools” began in theory and practice in full. At least, its first employee – a junior laboratory assistant, a graduate of Kharkiv Secondary Agricultural School of 1899, S. M. Bohoyavlensky (1876 – ?), was enrolled in its staff from August of 1901 (Bogoyavlenskij Sergej Nikolaevich, 1908, p. 35).

However, in the current reception, as the Department at which the discipline of “Agricultural Engineering and Mechanical Engineering” is taught, it appeared on March 18, 1900, after the review and approval of the project “Test Station for Agricultural Machines and Tools at Kyiv Polytechnic Institute” developed by Professor K. H. Schindler. He suggested the name of this Department or the principles of educational training of this discipline. Although there are grounds, due to legislative or regulatory analogues, to claim that the very beginning of the activity of the Department (discipline) with such a name became the basis for the establishing the Station. As time has proven, the candidacy of K. H. Schindler turned out to be not only a successful idea of the first director of KPI, Professor V. L. Kyrpychov, but even optimal, since he, elaborating or introducing a new discipline and the Department under it, took into account all the best of what he had seen abroad during a one-and-a-half-year internship funded by the Ministry of Agriculture and State Property in the USA and Europe.

By the way, time has proven my conclusion with the real success of the newly created Department at KPI, not only in terms of the level of educational training, but also in the

organization of the research process, especially in terms of design for the needs of agricultural engineering. To achieve these objectives, K. H. Schindler justified the need to have in the structure of the Kyiv Station for testing agricultural machines and tools a special laboratory of machine science, as well as two more for “physical and chemical analysis of soil ...”, as well as “... various products” (Izvestiya Stancii, 1907, p. 9). As part of the Station, which was located “... in 3 versts from the main building of the Institute ...” (Izvestiya Stancii, 1907, p. 10), there was also an experimental field, the land for which was allocated by the Kyiv City Administration, which occupied 30 acres, with four crop rotations: four–six–eighth– and three-field. It is no coincidence that the best material and technical base in the country for this type of institution provided an opportunity not only to provide a high-level educational training of specialists, but also to conduct priority special research, which the Station and the Department of Agricultural Machine Building and Mechanical Science of KPI carried out through, first of all, the holding of relevant competitions in field conditions combined with laboratory ones practically throughout the European part of the country. All together made it possible “... to lay the basis of engineering methods of approach to the assessment of the technological process of soil cultivation and, as a result, to the calculation of a specific type of working body” (Bulgakov, 1998, p. 42). But in the majority of cases, the results of the Department’s and the Station’s activities were of an applied nature for the needs of manufacturing of agricultural machinery improved samples.

Thus, in 1899, in the structure of KPI there were two Departments under the leadership of Professor K. H. Schindler: 1) Mechanics in the Agricultural Department and 2) Agricultural Engineering and Machine Science in the Mechanical Department. Professor K. H. Schindler was dismissed at both positions: the position of Dean at the Mechanical Department at KPI, as well as the Head of Kyiv Station for Testing Agricultural Machines and Tools after receiving the telegramme sent by S. I. Timashev, the Minister of Trade and Industry of the Russian Empire dated February 5, 1911. According to the “History” of NUBiP of Ukraine, after Professor K. H. Schindler’s dismissal during the period of “... 1911 – 1924 ... the Department was headed by ... Professor L. P. Kramarenko ...” (Kafedra silskohospodarskykh mashyn, 2018, p. 240).

As it turned out, not all of the above mentioned facts are true. After the dismissal and departure of K. H. Schindler, the Department of Agricultural Machinery was headed by his student, a graduate from the Agricultural Department of KPI (1904) and from January 13, 1910, a lecturer of Agricultural Machinery discipline at KPI (KSA, f. 18, d. 2, c. 271, p. 21) O. O. Khokhryakov (1877 – 1930?). He worked as the Head of the Department until January 1, 1912 (KSA, f. 18, d. 2, c. 271, p. 37) and resigned because of his appointment as a senior specialist of the agricultural part of the Department of Agriculture of the Main Directorate of Land Management and Agriculture.

There is every reason to believe that after O. O. Khokhriakov left for St. Petersburg, there was no Head at the Department, and the discipline was taught part-time by Professor P. R. Sliozkin (1862 – 1927). It was he who, since April of 1911, headed the Station for Testing Agricultural Machines and Tools along with performing the functions of the Dean of the Agricultural Department at the KPI. That is why, it was P. R. Sliozkin, as the Head of the Department of Applied Agriculture, who turned out to be the most competent specialist in the field of agricultural mechanical engineering. It is no coincidence that he was also the author of the unique for its time publication “Agronomist-practitioner in Farming. Guide to Getting Acquainted with Agricultural Machinery” (St. Petersburg, 1905, 136 p.). According to the



“Statute” of KPI (clause 23), P. R. Sliozkin, as Professor close to a vacant position, was paid half the salary of an ordinary Professor for part-time work. But according to its Paragraph 10, part-time work was allowed for no more than three years. Therefore, it becomes clear why in 1915 the teaching of the discipline “Agricultural Mechanical Engineering”, and the management of the Station, was transferred from Professor P. R. Sliozkin to L. P. Kramarenko. An even more significant argument for this was the refusal of Professor P. R. Sliozkin, due to health problems, from the position of Dean of the Agricultural Department at the KPI. The official appeal dated 04/28/1915 was approved by the Ministry of Trade and Industry on 05/05/1915 (Verhunov, 2007, p. 92). According to his own conviction, the main reason for P. R. Sliozkin’s rejection of almost all positions at the KPI was that he connected his further creative activity with Kyiv Commercial Institute established in 1906 (nowadays – V. Hetman Kyiv National University of Economics ).

As we managed to determine, L. P. Kramarenko headed the Department from 1915. At least, in the article for the collection dedicated to the 25th anniversary of the KPI and KSHI, it is stated, that “in 1915, the Faculty of Mechanical Engineering at KPI assigned an engineer L. P. Kramarenko for conducting lectures on the course of Agriculture Mechanical Engineering, who was entrusted with the management of the Station in 1916” (Kramarenko, 1923, p. 188). In the “Autobiography” of L. P. Kramarenko, it is stated that in 1907 he graduated with the 1st degree Diploma from the Physics and Mathematics Department of the University of St. Volodymyr (nowadays – Taras Shevchenko National University of Kyiv), and in 1913, also the Mechanical Department of Emperor Alexander II Kyiv Polytechnic Institute, obtained Diploma of a technological engineer. This proves that he could not in any way head the Department of Agricultural Engineering at KPI since 1911, which is confirmed by the modern history of its legal successor at NUBiP (Kafedra silskohospodarskykh mashyn, 2018, p. 240). As L. P. Kramarenko later pointed out: “in 1915, was elected by the Council of Kyiv Polytechnic Institute ... the head of the Department of Agricultural Machines ...”, and a little later, “... after conducting a lecture, was elected the Head of the Department of Mechanical Science and Mechanical Engineering at KPI” (AP NASU, f. 251, d. 3, c. 744, p. 46). This proves once again that there were two Departments with a similar name at KPI, and the one that over time in 1922 through KSHI passed to the present NUBiP of Ukraine, and in 1915 was called the Department of Agricultural Engineering.

Employees of the Department of Mechanical Science and Mechanical Engineering at KPI took an active part in the creation and activities of the leading creative associations at that time. Among them, there should be singled out the Kyiv Agricultural Society (KAT), which became the first and only specialized scientific society of the imperial period in the history of Ukraine. I consider it, to a certain extent, a forerunner of the Agricultural (later Scientific) Committee of Ukraine, which, in turn, through the Scientific and Advisory Council of the National Academy of Sciences of the UkrSSR, became the forerunner of the current National Academy of Agrarian Sciences of Ukraine in the form of the All-Ukrainian Academy of Agricultural Sciences from May 22, 1931 (Naukovo-orhanizatsiini zasady, 2016). At least, at the meeting of February 9, 1911, the next head of the State Technical Committee after Professor K. H. Schindler, Professor V. V. Kolkunov (1866 – 1939) at the KPI, also spoke in favour of the establishment of Scientific and Educational Agricultural Academy for the needs of the Ukrainian provinces (Protokol 2-go, 1912, pp. 1–4). The KAT began its activities after the approval of its “Statute” by the local administration on February 12, 1909, developed by 39 founders. Among them were Professors K. H. Schindler and P. R. Sliozkin, as well as O. O. Khokhriakov. The first of them was elected

as the chairman of the Board of the KAT at the founding meeting on February 17, 1909 (Otchet o deyatelnosti, p. 3). A little later, M. M. Kahan was also included into the list of members of the KAT. Without exception, all the employees of the Department of Agricultural Machinery Science at the KPI presented problematic reports at the general meetings of the members of this prestigious society for its time.

Employees of the Department, first of all, O. O. Khokhriakov and M. M. Kahan, initiated the emergence of another, practically forgotten nowadays, creative association – Kyiv Polytechnic Society of Engineers and Agronomists (“KPSE and A”). Moreover, O. O. Khokhriakov was one of its founders. He is among those who, on 11.12.1910, participated in the organizational meeting of the KPI graduates to discuss “... the main provisions of the “Statute” of the future society and the election of the organizational Bureau” (Vstupitelnoe slovo, 1913, p. 13). O. O. Khokhriakov and M. M. Kahan carried out their direct activities in (“KPSE and A”, primarily through the Technical Bureau, participating in the implementation of various problematic projects, providing relevant certificates and conducting laboratory tests in mechanical engineering at the Department, as well as involving the capabilities of Kyiv Station for Testing Agricultural Machines and Tools.

Members of the Department also participated in professional meetings of various kinds, from national to regional, as speakers. There were also exhibitions, competitions, fairs and professional comments in the column “From the Editors” to the leading magazines of their time, most of all – in the official printed organ of the South Russian Society for the Promotion of Agriculture and Agricultural Industry, better known as the Kyiv Agricultural Syndicate, – the magazine “Khoziaystvo”. It was possible to systematize the latter in relation to O. O. Khokhriakov and M. M. Kahan. Together, their creative work consisted of forty responses to readers’ letters up to and including 1912. Separate fundamental publications prepared based on the results of competitions for testing agricultural machines and tools, deserve even greater preferences, which contain the authors’ visions of the Department’s employees regarding the theoretical, methodological and practical foundations of agricultural engineering in Ukraine before the revolutionary events of 1917. At least, in 1907, the publication of the first issue of “News of the Station for Testing Agricultural Machines and Tools at Kyiv Polytechnic Institute” became the first publication of this type in the country (Izvestiya Stancii, 1907).

I have every reason to believe that the Department should have become the base in the first official attempt to radically change the system of training agricultural specialists, when the Minister of Land Affairs of the Ukrainian People’s Republic M. M. Kovalevsky (1892 – 1957) developed his project “Kyiv Agricultural Academy”. The first item envisaged the opening of six faculties at the newly established institution, which was joined by the Agricultural Department of the KPI: agronomic, forestry, border, veterinary, economic and engineering. The latter was subdivided into three departments: Engineering and Reclamation, Technological and Machine-building. For the needs of the latter was to become the basis, first of all, the Department of Agricultural Mechanization and Mechanical Engineering at the KPI and the Kyiv Station for Testing Agricultural Machines and Tools (Verhunov, 2005). The unique project was inherently ahead of its time, as it absorbed all the best of world analogues. The project received government support and even special budget funds for practical implementation, but another change of power during the Ukrainian Revolution of 1917 – 1921 prevented it. By and large, this approach largely found its embodiment in the modern and European training of relevant specialists at the NUBiP of Ukraine.

Due to the lack of necessary educational laboratories and classrooms for conducting practical classes, the educational training of specialists was provided by the Department of Agricultural Engineering and Agricultural Engineering at the KPI, which was united in 1920, headed by L. P. Kramarenko. In 1924, he was elected Professor of the second rank, and in the next year – of the first rank. He conducted lectures on “The Tractors” course at the KPI, and both disciplines at KSHI, but as part-time Professor. According to his own conviction, this decision was connected with the fact that the KPI was in its structure a well-technically equipped workshop necessary for construction.

By the resolution of the Presidium of the Holovprofosvity of the NKO of the UkrSSR dated September 11, 1922 and corresponding orders No. 814, 816 and 817 (Kyivskyi silskohospodarskyi instytut, 1922, p. 89) of September 1, 1922, the Agricultural Department at the KPI was transformed into a separate H. Rakovsky Kyiv Agricultural Institute. It included four departments (faculties): Zootechnical, Economic, Agricultural Mechanical Engineering and Agricultural (Agronomic). From next year, the Institute was financed by a separate budget article and had a separate material and technical base of auxiliary units along with seven departments, including the Department of Agricultural Technology. A Machine Testing Station and an experimental field with an area of 61 acres functioned at it, headed by an agronomist Hrebenchuk. During the period of 1922 – 1923, the Station and the Department conducted “... tests on several plows, cultivators and planters of the factory “Chervony Pluhatar”, but its full-fledged work was not yet “... completely organized ...” due to insufficient funds and the presence of unrenovated laboratory premises (Grebenchuk, 1923, p. 226).

Despite the fact that at KPI on January 1, 1926, there were eight research departments of the Holovnauky of the NKO of the UkrSSR (Bieliakov, Vasylenko, Vilkov & Havrysh, 1995, p. 54), another one under the title “Agricultural Mechanics” was established at KSHI in 1926, headed by Professor P. F. Vovk. In its structure, there were three sections: Mechanical Engineering, Mechanical Research and General Issues. The main goal of its activity was “... comprehensive research of agricultural machines and development of issues of a rational design and their use under the conditions of the UkrSSR” (Naukovo-doslidcha kafedra, 1930, pp. 50–51). Especially since in the UkrSSR at the time “... the majority of the agricultural machines in the Union were produced ...”, and “... about 40% of this number was used in Ukraine ...” along with a significant amount of equipment from abroad at a significant growth rate of domestic production, which in the mid-20s of the 20th century. “... exceeded the pre-war norm” (CSAHAU, f. 166, d. 6, c. 609, p. 19). As evidenced by the decisions of the joint meetings of the Department of Science of the People’s Commissariat of Education of the Ukrainian SSR and the Ukrainian Academy of Sciences, a huge problem remained the decrease in the quality of manufactured products compared to the pre-revolutionary period, as well as practical absence of an appropriate level of specialists. For this purpose, a decision was made to quantitatively strengthen the new Department of Agricultural Mechanics at KSHI, as well as “... to gather around it scientific and practical specialists of this field” (CSAHAU, f. 166, d. 6, c. 609, p. 19). In addition, during the period of 1926 – 1927, it was planned to create the Ukrainian Institute of Agricultural Mechanics with branches and specialized research stations on its base. In addition, it was decided that “... all agricultural machines produced and consumed in Ukraine must be comprehensively examined ...” (CSAHAU, f. 166, d. 6, c. 609, p. 19). Kyiv Agricultural Machinery and Tools Testing Station, which was reformed into the Kyiv Machine Research Station by Professor P. F. Vovk, began to perform this function. The issues

of theory, methodology and methodical support of agricultural mechanical science were dealt with employees and graduate students of the scientific research Department of Agricultural Mechanics of the NKO of the Ukrainian SSR in a close cooperation with colleagues of the corresponding educational Department of KSHI.

Academicians K. K. Syminsky (1879 – 1932) and M. M. Krylov (1879 – 1955) of the Ukrainian National Academy of Sciences, as well as Professor L. P. Kramarenko, became active members of the Research Department of Agricultural Mechanics of Ukrholovnauky NKO of the Ukrainian SSR at the KSHI. Its employees included engineers V. Kh. Chaly and future academician of the Academy of Sciences of the Ukrainian SSR O. A. Vasylenko (1891 – 1963). By the way, L. P. Kramarenko headed the Department Agricultural Engineering Section “... until the beginning of 1930, when in connection with the transfer to Kharkiv he had to quit this position” (APNASU, f. 251, d. 3, c. 744, p. 47). The results of their research are published by the members of the Scientific Research Department of Agricultural Mechanics of the NKO UkrSRR at KSHI on the pages of the leading industry journals: “Scientific and Technical Bulletin of the Ukrainian Scientific Society”, “Bulletin of Agricultural Science”, “Bulletin of the Institute of Technical Mechanics”, etc. (Naukovo-doslidcha kafedra, 1930, p. 51). In 1927–1928 under the leadership of P. F. Vovk, the research Department of Agricultural Mechanics of Ukrholovnauka NKO UkrSRR at KSHI tested such agricultural machines as “... dumpers, beet-combined and universal-combined planters and hay-mowers ...”, primarily for the needs of standardization of such equipment (CSAHAU, f. 166, d. 12, c. 1212, p. 30). The results of the research were published in the “Notes of the Ukrainian Commission on Standardization of Agricultural Machines”, and the relevant developed standards were sent to the manufacturing plants.

In many respects, the Department became one of the basic departments after its closure on June 22, 1930, in order to implement the decisions of the July (1928) Plenum of the Central Committee of the All-Union Communist Party of Ukraine (b) – KSHI during the establishment of a separate educational Kyiv Institute of Mechanization and Electrification of Agriculture in 1930. It seems that some part of the Department staff personally participated in the formation of Kyiv Agricultural Engineering Institute of Sugar Industry, established that year, and also remained at Kyiv Agronomic Institute. In the 1920s, Professor L. P. Kramarenko successfully and creatively worked as a Professor at the Department of Agricultural Machine Science of KSHI, in addition to fulfilling his duties at KPI, conducting lectures on “Agricultural Engineering, Theory and Calculation of Agricultural Machines” (Kramarenko Leonid Petrovich, 1928, p. 193). In September of 1929, before the arrest, the Department was headed by Professor P. F. Vovk.

First personally, and then systematically, the Department staff joined the development of activities in the field of agricultural engineering created on October 1, 1918, headed (from October 16, 1918) by academician V. I. Vernadsky, the organizational predecessor of the National Academy of Agrarian Sciences of Ukraine in the form of Agricultural (later from 1920 – scientific) Committee of Ukraine. In accordance with the new “Statute of the SHNKU” approved by the National Committee of the Ukrainian SSR on August 9, 1923, a technical section headed by D. M. Diachenko functioned in its structure, consisting of three sections: agricultural engineering, agricultural construction and agricultural industry. First of all, through the first of them, the cooperation of the Department in the field of branch science was established. There is every reason to believe that since 1919, L. P. Kramarenko had been one of the 12 members of the Plenum of the CHVKU from Kyiv Polytechnic

Institute (CSAHAU, f. 1230, d. 1, c. 2, p. 16). The technical section as "... the centre of all technical sciences related to agriculture ..." was responsible for ensuring the development of agricultural mechanical engineering and "... testing of freely available mechanisms ..." regarding "... relevant requirements of agriculture and sanitary equipment" (CSAHAU, f. 1230, d. 1, c. 2, p. 11). For these purposes, since 1919, the capabilities of Kyiv Station for Testing Agricultural Machines and Tools began to be involved. With the organization of the Research Commission of the CHVKU on December 2, 1922, first of all, by two representatives of the technical section, K. Obremsky and N. Prybylsky, the Department participated in the development of a strategic plan for the experimentation development for the needs of agricultural engineering and mechanical engineering (Moskvichev, 1923, p. 58).

Certain difficulties in cooperation arose after the relocation of the SHNKU from Kyiv to Kharkiv at the end of 1923. Despite the fact that the main staff of the Committee moved to a new capital of the UkrSSR, since 1924, the cooperation of the Department had taken place through the subsection of agricultural engineering and mechanical engineering of Kyiv branch of the technical section of the SHNKU. The cooperation was embodied in the preparation of "... the first album of drawings of agricultural machines, the most widespread in Ukraine" (Yanata & Petrenko, 1924, pp. 16–17). In addition, the staff of the Department joined the work of another subsection, namely the Terminological and Translation Section, which dealt with the translation of Lauenstein's "Mechanics" and de-Rochefort's "Lesson Regulations" in order to organize technical definitions. The Department also took part in the development of the organization project of the Research Tractor Station at the SHNKU.

The gap in the implementation of powerful research projects between Kyiv and Kharkiv led to the fact that, in accordance with the new "Statute of the SHNKU" dated February 2, 1925, the Technical Section ceased its centralized activities (CSAHAU, f. 166, d. 6, c. 1220, p. 50), and its functions in the sub-section of agricultural mechanistic science, the Presidium of the SHNKU decided to transfer it to the Research Department of Agricultural Mechanistic Science or Mechanics at KSHI, which operated in the structure of the NKO of the UkrSSR (CSAHAU, f. 166, d. 6, c. 1270, p. 176). However, the NKZS of the UkrSSR decided, in accordance with order No. 111/2100 of 09/30/1927, to transfer it to its Tractor Committee initially (CSAHAU, f. 1230, d. 1, c. 1, p. 2).

According to the resolution of the NKZS of the UkrSSR dated September 16, 1927, Professors P. F. Vovk, O. O. Alov and I. F. Vasylenko, were among the first members of the Scientific Advisory Council in the field of "Agricultural Mechanical Engineering" (CSAHAU, f. 1230, d. 1, c. 1, p. 6), thereby proving that they were the most authoritative experts in this field of knowledge and skills in the UkrSSR in the 20s of the 20th century. On July 23, 1928, under the chairmanship of P. F. Vovk, a meeting of the Bureau of the NKR of the NKZS of the UkrSSR was held, where it was decided to convene the second session of the NKR of the NkrKZS of the UkrSSR in December of 1928. Professor P. F. Vovk was assigned to deliver a plenary report on it "Forms of Contact of Research Institutions of the NKZS and NKO (principle provisions)". At the same meeting, he suggested creating two instead of one Ukrainian Research Institute of Machine Science and Machine Building: the Institute of Machine Science in Kharkiv and the Institute of Machine Research and Machine Economy in Kyiv (CSAHAU, f. 27, d. 9, c. 502, pp. 298–299). The latter was planned on the basis of the scientific-research Department of Agricultural Mechanics of the NKO of UkrSSR at KSHI.

The issue was brought up to date by the fact that, according to the letter of the Administration of the Affairs of the RNK of the Ukrainian SSR No. 1522 dated June 19, 1928, it was



planned to establish two Ukrainian Agricultural Academies in the Republic: one scientific “... as an associative top, which would unite existing research institutions under the People’s Commissariat of Production in Kharkiv ...” and another – “of an educational type, in Kyiv ...” (CSAHAU, f. 27, d. 9, c. 502, p. 330). On August 31, 1928, Deputy People’s Commissar of Land Affairs of the Ukrainian SSR K. Ya. Fedotov sent the appropriate appeal-substantiation to the the RNK of the Ukrainian SSR and the Economic Council of the Ukrainian SSR. In it, he emphasized that the NKO of the Ukrainian SSR worked on the creation of the USHA in “... Hosiivtsi, near Kyiv ...” as “... a special higher scientific and educational institution, into which the currently existing Kyiv Agricultural Institute will merge with Kyiv Veterinary and Zootechnical Institute and some other higher educational institutions of the city of Kyiv” (CSAHAU, f. 27, d. 9, c. 501, p. 155). The establishment of the USAA in Kyiv was foreseen by the resolutions of the Ukrainian conference on the study of production forces, held under the Ukrderzhplan on March 11–13, 1927.

In accordance with the Resolution of the RNK of the Ukrainian SSR dated October 9, 1928, Professor P. F. Vovk became a member of the special Commission of Non-governmental Organizations of the Ukrainian SSR with the participation of “... representatives of the NKZS, VRNH, S.H. Cooperation and other interested institutions and organizations” along the lines of “... Ukrainian S. H. Academy and S. H. Ukrainian Academy” (CSAHAU, f. 27, d. 9, c. 502, p. 363).

In 1928, the Kyiv Station for Testing Agricultural Machines and Tools of KSGI, which had been operating since 1900 at the Department, continued to carry out its activities under the new name: Kyiv Machine Research Station of KSHI. Its head, Professor P. F. Vovk, confirmed this fact. Among the research objectives of the Station there were the following ones: “1. Development of research methods of rural and urban areas. machines and construction of precise instruments for research; 2. Transfer of laboratory and field studies of agricultural machines in order to test the existing theories of the operation of individual mechanisms and machines in general; 3. Drawing up programmes for the transfer of machine research; 4. Development of accounting methods for the economic factors of work of agricultural machines – passporting, study of agricultural machines and their operation; 5. Study of issues related to the operation of living engines”, and as for the issue of the connection of the results of scientific developments with practice, the following was carried out: “1. A comprehensive study of the operation of tractors and their trailers in agriculture; 2. Research and designing machines that would make it possible to mechanize sugar beet cultivation; 3. Research on machines for the culture of clover and legumes in general; 4. Research on machines of new production of the Soviet factories and foreign ones; 5. Development and research on bread harvesting tools” (Vovk, 1927, p. 111). The Station carried out all these studies together with the Department through its organizational structure, namely: 1. Museum of agricultural machines. 2. Dynamometric laboratory. 3. Laboratory of soil science. 4. Laboratory of precise tools. By the way, this type of Museum was the best in the UkrSSR.

The decision of the Bureau of the NKR NKZS of the UkrSSR dated February 21, 1929 on “... handover to the ... Scientific and Technical Bureau at the Department of Industrialization ... Ukrainian Scientific Research Institute of Economics and the Organization of Rural Economy ... of the sums that were foreseen in the estimate of the National Council of the People’s Republic of Ukraine for the development of problems of mechanization of agriculture in the amount of 6,480 kr. actually destroyed the possibilities of establishing a corresponding All-Ukrainian Research Institute on the basis of the Research Department of

Agricultural Mechanics of the Ukrainian Head of Science of the National Organization of the Ukrainian SSR at the KSHI (CSAHAU, f. 27, d. 9, c. 502, p. 474). After consideration at the NKR of NKZS of the UkrSSR on 28.06.1929 and the approval of a new organizational structure of the experimental department of the NKZS of the UkrSSR into a scientific Research Department and its establishment "... of the scientific and public organization... Scientific council... which now included the directors of research institutes and regional research stations of the UkrSSR, P. F. Vovk becomes only a member of its Section 8, namely: Agricultural Machinery and Agricultural Mechanization" (CSAHAU, f. 27, d. 10, c. 72, p. 9). But his arrest in September of 1929, caused by the denunciation of one of the employees of the Department with charges for conducting lectures at which Professor P. F. Vovk seemed to mention preference of horse-drawn to tractor-drawn agricultural machines, and who was involved in the "Union for the Liberation of Ukraine", and the case was fabricated by the DPU, the NKVD authorities in 1930, actually ended the outstanding state-building feats of the Department headed by him, as well as the Faculty of Agricultural Engineering at KSHI in the difficult 20s of the previous century. A new stage of exclusively "Soviet existence" on a "democratic" planned basis began.

**The Conclusion.** Modern Academician P. M. Vasylenko Department of Agricultural Machinery and System Engineering of the NUBiP of Ukraine has a long, but rather difficult history of formation and development, especially during the period of 1898 – 1929. It owes its appearance, as well as Kyiv Station for Testing Agricultural Machines and Tools, to the "Regulations" and "Statutes" of the KPI, and especially to Professor K. H. Schindler. As a result, as of 1911, at almost all the leading factories producing agricultural implements in the country, the relevant departments were headed by students of Professor K. H. Schindler. Further development of the Department, – under the title "Applied Mechanics" and united since September 1, 1899 – "Mechanics" at the Agricultural Department and "Agricultural Engineering and Machine Science" at the Mechanical Department, and, most importantly, – the preservation of its potential during the period of 1911 – 1912 should be owed to O. O. Khokhriakov, and later, in 1912 – 1915, to Professor P. R. Sliozkin. Later, during the Ukrainian Revolution of 1917 – 1921, its development was associated with the future corresponding member of the Academy of Sciences of the Ukrainian SSR L. P. Kramarenko. Together with another student of Academician V. P. Horiachkin (1868 – 1935) – Professor P. F. Vovk, he ensured the Department's legal succession in the field of research and education during the ambiguous transformation of spiritual values in the 20s of the 20th century. Among other things, there should be highlighted the state-building cooperation of the Department with the forerunner of the National Academy of Agrarian Sciences of Ukraine in the form of the Agricultural Scientific Committee of Ukraine and, especially, – by the Scientific and Advisory Council under the specialized People's Commissariat (ministry) – respectively during the years of 1919 – 1927 and 1927 – 1929. The lack of reliable archival documents does not make it possible to comprehensively and carefully reproduce the contextual picture of the course of all events and facts with a full personalized content in the Department's records for the sake of the future of one of the most effective and innovative directions of branch research of the second half of the 19th – the beginning of the 20th centuries – domestic agricultural engineering and testing of agricultural machinery for its needs.

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**FROM THE HISTORY OF THE POLISH CIVIL SPECIAL SERVICES  
IN THE TERRITORY OF INTERWAR VOLHYNIA AND GALICIA:  
DEPARTMENT IV–D AND ITS ORGANIZATIONAL STRUCTURE (1920 – 1923)**

**Abstract.** *The purpose of the article is to elucidate the organizational structure of one of the Polish civilian special services – Division IV–D on the territories of Volhynia and Galicia in 1920 – 1923. From the first days of regaining independence in 1918, Poland began work on the creation of special services – an integral attribute of every country. During the interwar period, the functions of the security service on the territory of the Second Polish Republic were performed by military and civilian units. One of the civilian security structures was the political police, namely its Department IV–D, which conducted its activities in 1920 – 1923 within the Ministry of Internal Affairs. The article focuses on the organization of this structure on the territory of Volhynia and Galicia.*

*The research methodology is based on the use of general scientific and specially historical research methods, including problem-chronological, synchronous, diachronic, comparative and*

historical and the others. **The scientific novelty** is that the authors tried, on the basis of unpublished archival materials, to highlight comprehensively the organizational structure of Department IV–D on the territory of Volhynia, Lviv, Ternopil and Stanislaviv voivodships of the Second Polish Republic.

**The Conclusion.** It has been determined that Department IV–D had its branches in every voivodeship center of the studied region – Lutsk, Lviv, Ternopil and Stanislaviv. At the poviat level, agencies of Department IV–D were located in Lutsk, Rivne, Ostroh, Kremenets, Volodymyr, Lviv, Peremyshl, Husiatyn, Skalat, Pidvolochysk (later in Ternopil), Stanislaviv, Stryi, Kolomyia, Turka and Sniatyn. The proper work of this special service was hindered by personnel and material problems, as well as competence misunderstandings both with other units of the Ministry of Internal Affairs and with the administrative authorities. In the course of its short-term activity, the structural units of Department IV–D failed at skillful fulfilling of their duties and ensuring of safety in the social and political sphere. As a result, this led to the termination of Department IV–D and the creation of a new security structure – Information Service, which had similar tasks but a different system of organization and subordination.

**Key words:** Volhynia, Galicia, Poland, political police, special services.

### З ІСТОРІЇ ПОЛЬСЬКИХ ЦИВІЛЬНИХ СПЕЦСЛУЖБ НА ТЕРЕНАХ МІЖВОЄННОЇ ВОЛИНИ ТА ГАЛИЧИНИ: ВІДДІЛ IV–D ТА ЙОГО ОРГАНІЗАЦІЙНА СТРУКТУРА (1920 – 1923)

**Анотація.** Метою запропонованої статті визначено представлення організації на теренах Волині та Галичини однієї з польських цивільних безпекових структур – Відділу IV–D у 1920 – 1923 рр. Польща з перших днів відновлення незалежності у 1918 р. розпочала роботу зі створення спецслужб – невід’ємного атрибуту кожної країни. Упродовж міжвоєнного періоду функції служби безпеки на теренах Другої Речі Посполитої виконували військові та цивільні підрозділи. Однією із цивільних безпекових структур була політична поліція, а саме її Відділ IV–D, який провадив діяльність у 1920 – 1923 рр. у межах Міністерства внутрішніх справ. Організації цієї структури на теренах Волині та Галичини й присвячена ця стаття.

**Методологія дослідження** ґрунтується на використанні загальнонаукових і спеціально історичних методів дослідження, у тому числі проблемно-хронологічного, синхронного, діахронного, порівняльно-історичного та ін. **Наукова новизна** полягає у тому, що автори спробували на основі неопублікованих архівних матеріалів комплексно висвітлити організаційну структуру Відділу IV–D на теренах Волинського, Львівського, Тернопільського та Станіславівського воєводств Другої Речі Посполитої.

**Висновки.** Встановлено, що Відділ IV–D мав експозитури (представництва) у кожному воєводському центрі досліджуваного регіону – Луцьку, Львові, Тернополі та Станіславі. На повітовому рівні боротьбою з проявами антидержавної діяльності займалися агентури (філії) Відділу IV–D, які розташовувалися у Луцьку, Рівному, Острожі, Кременці, Володимирі, Львові, Перемишлі, Гусятині, Скалаті, Підволочиську (згодом у Тернополі), Станіславі, Стрию, Коломиї, Турці та Снятині. Справній роботі цієї спецслужби перешкождали кадрові та матеріальні проблеми, а також компетенційні непорозуміння як з іншими підрозділами МВС, так і з адміністративною владою. Упродовж нетривалої діяльності структурним ланкам Відділу IV–D не вдалося вправно організувати свою роботу, виконати покладені обов’язки та забезпечити безпеку у суспільно-політичній сфері. У підсумку це зумовило припинення діяльності досліджуваного спеціального підрозділу та створення нової безпекової інституції – Інформаційної служби, яка мала подібні завдання але вже іншу систему організації і підпорядкування.

**Ключові слова:** Волинь, Галичина, Польща, політична поліція, спеціальні служби.

**The Problem Statement.** Between the two World Wars, the lands of Western Volhynia and Eastern Galicia were part of the revived Polish state – the Second Polish Republic and administratively comprised four voivodships (Lviv, Ternopil, Stanislaviv and Volhynia). Integration and arrangement of the region, as part of the newly annexed eastern and

southeastern lands, were important and at the same time difficult tasks to Poland in 1918 – 1923. This was caused both by the current international and domestic political situation (in particular, the issue of the statehood of Eastern Galicia and the recognition of the eastern border), and by a long stay of these territories within the boundaries of different empires – Russian and Austro-Hungarian. Having many internal and external factors that threatened the security of the state, from the first days of independence the Polish authorities began work on the creation of special services – an integral part of every country. Between World War I and World War II, the functions of the security service on the territory of the Second Polish Republic were performed by both military and civilian structures. The military ones included: Department II of the General (Main) Staff of the Polish Army, as well as formations related to the protection of the state border – the Border Guard Corps and the Information Service of the Border Guard. Instead, the tasks of the civil security service were performed by the political police (1919 – 1926), separate units of the investigative service, as well as the security departments of voivodship administrations and starostvs (1926 – 1939). Before the coup d'état under J. Piłsudski in 1926, the political police was reorganized several times and, as a result, acted under different names: Inspectorate of Political Protection (Defensives) (1919 – 1920), political protection (defensive) – Department IV–D (1920 – 1923), Information Service (1923 – 1924), and Political Police (1924 – 1926) (Razyhrayev, 2012, p. 17).

**The Analysis of Researches and Publications.** The issue of the past of the civil special services in the Second Polish Republic was the subject of interest among the Polish researchers mostly. Accordingly, we can single out the works by A. Peplowski (Peplowski, 1991), A. Misiuk (Misiuk, 1998), R. Litwiński (Litwiński, 2007), K. Halicki (Halicki, 2010) and the others. In the Soviet historiography scholars analysed the outlined subject only in the context of the struggle of Polish security structures with communist activity in the territory of Western Ukraine. In modern Ukrainian historical science there are analyses of the issue mainly through the prism of opposition to the Ukrainian national movement and anti-Polish anti-Bolshevik activities during the interwar period. At the same time, the issue of organization and activities of the civil state security bodies of Poland in Volhynia and Galicia, as well as the general functioning of the police and penitentiary structures of the Second Polish Republic, was highlighted by O. Razyhrayev (Razyhrayev, 2019, etc.).

**The purpose** of the article, taking into consideration its scope and nature, is to elucidate the organizational structure of one of the Polish civilian special services – Division IV–D in the territories of Volhynia and Galicia in 1920 – 1923.

**The Results of the Research.** Department IV–D was established in the structure of the Ministry of Internal Affairs of the Second Polish Republic at the climax of the Polish-Bolshevik War – in August of 1920. In this difficult time, the specified civil special service was called to counter anti-state activities and consisted of the following divisions: central surveillance, informational, and organizational personnel. The central surveillance unit was engaged in the accumulation and registration of personal and property materials related to crimes of state importance. The information division was divided into two departments (reference offices). The first collected materials related to anti-state activities through voivodeship branches, and the task of the second one was to search for information on non-Polish citizens and spies. The organizational and personnel division carried out personnel register, took care of the financial situation of its employees and economic affairs. As for the territorial subdivisions of this structure, in voivodeships there were branches (expositories) of Department IV–D, and within individual poviats – agencies of the specified department.

These formations were established, as it was written in the relevant legal documents, “to combat espionage, communism and anti-state activities in general”. Agencies of Division IV–D were part of the district police teams (departments) (Archiwum Narodowe w Krakowie (ANK), zesp. 206, sygn. 74, pp. 2095–2099; Archiwum Państwowe w Lublinie (APL), zesp. 448, sygn. 5 (mkf. 116558), p. 2–6).

Department IV–D became the first political police unit that started operating on the territory of Volhynia Voivodeship. Its office was opened at the beginning of February of 1921 in the city of Lutsk and operated under the leadership of A. Tarnawski. At the district level, the agencies (branches) of Department IV–D, located in Lutsk, Rivne, Ostroh, and Kremenets, were engaged in the fight against manifestations of anti-state activity. In 1921, for a short time, Volodymyr agency of Department IV–D also operated (State Archive of the Volyn Region (SAVR), f. 1, d. 4a, c. 97, p. 4; f. 46, d. 9, c. 7, p. 27).

We learn about the first weeks of political police operating in Volhynia Voivodeship from the situational report of the district police commandant dated February 24, 1921, which he sent to the head of the state administration of the region. Thus, the document stated that a proper operation of Department IV–D depended on the quality selection of personnel, as well as elimination of weapons shortage, availability of appropriate office premises, as well as a proper cooperation with other authorities. At the same time, Department IV–D suspected illegal censorship of government correspondence by employees of Kovel and Lutsk post offices. According to the information of the specified special service, Kovel post office was mainly staffed by the Ukrainians and the Russians who did not want to leave for evacuation and did their work during the short-lived Bolshevik occupation in 1920 (SAVR, f. 46, d. 9, c. 10, p. 4).

Division IV–D also operated at Lviv, Ternopil, and Stanislaviv district administrations of the state police. In 1921, Lviv Division IV–D was headed by K. Ivakhuw and Zh. Kozłowski (ANK, zesp. 206, sygn. 74, s. 2100; SAVR, f. 1, d. 4, c. 52, p. 5). At the end of the same year, the above-mentioned police officers received a written note of gratitude by the head of the Polish State Police, W. Henschel, for their fruitful, long-lasting and effective work in the case of exposing the Communist Congress (ANK, zesp. 218, sygn. 162, s. 119). It was probably about the revelation of a secret conference of representatives of the Communist Party of Poland and the Communist Party of Eastern Galicia in one of the buildings of St. George Cathedral in Lviv, which caused a wave of police arrests against left-wing radicals at the end of October of 1921. In general, from the first years of the revival of Poland’s independence, the communists constituted one of the largest groups of political prisoners, whose guardianship was carried out by the International Organization for Aid to Revolutionaries from 1924 (Razyhrayev, 2020a, p. 88; Razyhrayev, 2020b, pp. 252–274).

According to the decree of the Minister of Internal Affairs of August 10, 1922, Ja. Sawitski became the head of Lviv Department IV–D (SAVR, f. 1, d. 4, c. 103, p. 81). From March of 1921, Stanislaviv Department IV–D was headed by S. Hendryhowski (SAVR, f. 1, d. 4, c. 56, p. 9; ANK, zesp. 206, sygn. 74, p. 2100). From July of 1921, Ternopil Department IV–D was headed by Ja. Rosnor. M. Kolodzei was appointed the next head of the specified security unit (SAVR, f. 1, d. 4, c. 57, pp. 64, 10).

At the district level in Galicia, as well as in Volhynia, agents of the specified department and specially trained policemen of the district offices staff of the state police carried out activities. Thus, 10 agencies of Department IV–D operated in Galicia, namely: Lviv Voivodeship – agencies in Lviv and Przemyśl; Ternopil Voivodeship – agencies in Husiatyn, Skalat and

Pidvolochysk (later in Ternopil); Stanislaviv Voivodeship – agencies in Stanislaviv, Stryi, Kolomyia, Turka and Sniatyn (SAVR, f. 1, d. 4, c. 103, pp. 71, 73; Misiuk, A, 1989, p. 339).

Department IV–D was headed by the head, who was subordinate to the district (voivodeship) commandant of the state police, as well as administrative and judicial authorities. On the other hand, the leadership of the agencies of Department IV–D was dependent on both their own leadership and the commandants of the district offices of the state police. The political police consisted of three departments (reference departments): informational and reporting; registration and investigation officer; administrative and legal. The first two departments were secret bodies and did not appear officially in the documents. Their managers in a conspiratorial way reported only to the head of Department IV–D or his deputy. Instead, the administrative and legal department was, to some extent, an open structure and could be located in the premises of the police investigative department (ANK, zesp. 206, sygn. 74, pp. 2095–2098; ANK, zesp. 218, sygn. 13, pp. 245–254; APL, zesp. 448, sygn. 5 (mkf. 116558), p. 11). The activities of Department IV–D agencies were of two types: intelligence and administrative legal. The heads of the agencies of Department IV–D informed the leadership of the regional offices of the state police about political affairs in the region. According to the instructions of the head of the poviats or the commandant of the poviats police department, they simultaneously engaged in political intelligence. In poviats where there were no agents of Department IV–D, the functions of the latter were performed by the commandants of the poviats police departments or their deputies (State archive of Ivano-Frankivsk region (SAIFR), f. 2, d. 1, c. 9, pp. 27–34).

In February of 1922, the following subdivisions of Department IV–D operated in Volhynia: the subdivision in Lutsk, in which 13 employees worked, agencies in Rivne (9 employees), Ostroh (6 employees), Kremenets (6 employees) and Lutsk (1 official). There were 4 policemen in Kovel and Dubno poviats administrations each, who were engaged in political affairs. Only 3 employees – in Volodymyr poviats administration, 2 employees – in Horokhiv and Liuboml each. In Volhynia the Control Station in Rivne, which checked the arriving repatriates from Soviet Ukraine, the Railway Commissariat of the State Police in Zdolbuniv, the Border Commissariat and the border post in Korets, the border posts in Mohyliany and Borshchivka also belonged to subdivisions of Department IV–D (SAVR, f. 1, d. 1, c. 199, p. 68). In 1923, agencies in Rivne, Ostroh, Dubno, Kremenets, Kovel, and Volodymyr operated under the leadership of Department IV–D in Lutsk (Misiuk, 1989, p. 339).

At the beginning of 1922, developed by the Main Directorate of the State Police, the staff list of Department IV–D included 55 employees in Lutsk. There was even a smaller staff of the political police of Eastern Galicia: the branch of Department IV–D in Lviv – 49 employees; the branch office of Department IV–D in Ternopil – 34 employees; the branch office of Department IV–D in Stanislaviv – 31 employees. The decrease in the number of employees of both political police and the Ministry of Internal Affairs was largely due to a difficult economic situation in Poland at the time (Misiuk & Peplowski, 1992, p. 299).

In Lviv assistance to the units of the political defense was provided by the state police of this voivodeship centre, which from August 15, 1921 received a special status – it operated under the authority of the poviats administration (command) of the state police. In particular, in addition to the main duties inherent to internal affairs bodies, the mentioned above unit supervised foreigners who lived in Lviv; had the right to “oust” suspicious people from the city; participated in the fight against espionage and anti-state activities in general (ANK, zesp. 248, sygn. 132, no pagination). In 1923, Ternopil agency of Department IV–D also took



over the documentation and functions of the reorganized Control Station of the State Police in Ternopil, which dealt with population registration in the context of repatriation processes with the Soviet authorities (State archive of Ternopil region (SATR), f. 274, d. 1, c. 728, p. 1).

In Galicia competence misunderstandings regarding “political issues” between the special service and the state administration were observed at the beginning of Department IV–D activities. Thus, on June 16, 1921, the Ministry of Internal Affairs sent a “completely secret” letter to the temporary head of the state administration in Eastern Galicia – the General Delegate of the Government in Lviv, in which it asked the latter not only to control the activities of Department IV–D in the field of social and political supervision life, and moreover, to manage such activities of the political police. At the same time, in this letter of the Ministry of Internal Affairs it was noted that the state administration was supposed to supervise a legal social and political life, instead, illegal social and political activity was supposed to be within the competence of the employees of Department IV–D (SAIFR, f. 2. d. 1, c. 9, p. 2).

Inconsistencies in the activities between the administrative authorities and Department IV–D were also recorded in Volhynia. For example, in a letter to the voivode dated June 17, 1921, in Volodymyr the starosta (a community chief member) complained about the non-fulfillment of duties by the local civilian special services regarding the collection of information about various people, including politically suspicious ones. The mayor noted that at first the political police explained the failure to fulfill their tasks by the need to study the situation better, familiarize themselves with the poviat, and material problems. However, later the situation did not change. According to the starosta, the head of the agency of Department IV–D did not fulfill any of his serious assignments. In the letter to the voivode, in Volodymyr starosta gave the following example of the lack of cooperation with Department IV–D: “I instructed the head to prepare a characteristics of the founder of the Ukrainian consumer cooperative. During the month, the head did not collect any information. When I gave him a final five-day deadline... he volunteered to see me and stated that he would not be able to prepare the characteristics due to a lack of personnel” (SAVR, f. 46, d. 9, c. 7, p. 27). In 1923, the head of Kremenets Poviats of Volhynia Voivodship stated that the relations between the agents of Department IV–D and starostvo had not been settled. Such a situation led to the fact that even the starosta, together with the employees of local state administration, could be the object of a secret surveillance by civilian special services (SAVR, f. 46, d. 9, c. 5, pp. 24–24a).

Along with the conflict situations with the representatives of the state administration, the issue of the place of political defensiveness in the internal structure of the police arose quite acutely. Branch offices and agencies of Department IV–D were accused of ignoring contacts with local police authorities, as well as independence in practical activities, there were often observed misunderstandings between employees of Department IV–D and ordinary law enforcement officers. In particular, in a letter dated March 3, 1922, the deputy of Lviv commandant of the state police complained to subordinate structural units about a tactless behaviour of representatives of the general police corps towards political police officers during official relations. For example, police officers could call out the names of their “political” colleagues, which eventually led to the deconspiracy of the latter (CSHAUL, f. 601, d. 1, c. 11, p. 2). At the beginning of the same year, the head of the branch office of Department IV–D in Lviv, sub-inspector Zh. Kozłowski, appealed to the top leadership of the political police with a demand to prohibit the Ukrainian press from publishing the names of employees of his department, which also contributed to their exposure. In general, the attitude of the aforementioned head of the political defense of Lviv Voivodship towards the

Ukrainians was quite biased. Thus, in 1922, at one of the conferences of heads of Department IV–D branch offices, he noted, that in Eastern Galicia, the security authorities could not send criminal cases to prosecutors of the “Ruthenian” (Ukrainian – the author) nationality due to their attitude towards the Polish state (ANK, zesp. 206, sygn. 74, ss. 2088, 2093).

At the end of April 1921, in a letter to Volhynia Voivodeship Administration, the head of Ostroh poviat complained about an inadequate professional training of the local agents of Department IV–D and the absence of its head (SAVR, f. 46, d. 9, c. 6, p. 1). A low level of professional training and moral qualities of employees of Kremenets Agency of Department IV–D was noted by the local headman at the beginning of April of 1923. In particular, in a letter to Volhynia Voivode S. Srokowski dated April 3, he wrote that not numerous political police of the poviat did not even deserve their name: “These are some not very smart people who are completely clueless in their tasks; mostly drunkards of a low ethical level, confident of their impunity due to the population’s depression, abuse their official position for various dishonest purposes, from violence to ordinary bribery... At the moment, of the total number of four agents, two have been suspended from their duties and are under investigation for abuse ...” (SAVR, f. 46, d. 9, c. 5, pp. 24–24a). At the same time, the headman of Kremenets poviat characterized the activities of the intelligence units of Department II of the General Staff of the Polish army positively.

An effective activity of the special services could be marked with special gratitude both at the voivodeship and national level. In particular, in April of 1922, the head of Ternopil police expressed his gratitude in a written form to the local head of Department IV–D, M. Kolodzei for his conscientious work. On the other hand, at the end of the same year, the Chief Commandant of the State Police in Warsaw noted the success of the entire corps of Department IV–D in Ternopil Voivodeship in the fight against the anti-state movement (SAVR, f. 1, d. 4, c. 110, pp. 43, 145). Another letter of gratitude by the head of the Polish police, V. Goszowski, dated December 18, 1922, concerned the employees of Department IV–D of all three Eastern Galicia voivodeships. In particular, it referred to the “devoted work” of the police in the fight against anti-state activities, which led to stabilization of the security situation in the region (SAVR, f. 1, d. 4, c. 109, p. 77).

In March of 1922, the congress of heads of Department IV–D branches was held in Warsaw, at which Volhynia Voivodeship was represented by A. Tarnawski, Lviv Voivodeship – by Zh. Kozłowski, Ternopil Voivodeship – by M. Kolodzei, Stanislawiv Voivodeship – by S. Hendryhowski. Characterizing the results of the political police, the deputy chief commandant of the state police highly praised the work of the structural divisions of Volhynia and Lviv voivodeships. At the same time, the head of Volhynia branch of Department IV–D submitted a request to the Main Directorate of the State Police to resolve the issue of strengthening the staff and improving the material base of the local political police unit. According to A. Tarnawski, the material and technical base at that time greatly hindered a proper execution of orders and directives of the management (Misiuk & Peplowski, 1992, pp. 292–293, 308).

Similar requests were also expressed by the managers of the Galician branch offices of Department IV–D. For example, the head of the political police of Lviv region, Zh. Kozłowski, asked the Main Directorate of the State Police to increase the number of “intelligence officers” who were supposed to deal with “political affairs” from 14 to about 50. M. Kolodzei, the head of Department IV–D branch in Ternopil, expressed a request for 10 full-time units of police officers, who should be engaged in “political investigation”, as well as to increase the number of employees from 14 to 30. In addition, Ternopil political police were in need of clothes for civilian “intelligence officers”. The head of the political police of

Stanislaviv Voivodeship, S. Hendryhowski, asked the Main Directorate of the State Police to increase the number of employees of Department IV–D. At the same time, he noted that the wages of his subordinates were extremely low and had impact on the intensity of work. Moreover, according to his information, employees of the criminal (investigative) police earned significantly more than employees of the political unit, which was unfair considering the importance of work of the latter (Misiuk & Peplowski, 1992, pp. 307–308).

The head of Department IV–D branch in Volhynia Voivodeship, A. Tarnawski's official request was not properly satisfied because in January of 1923, in Department IV–D of Volhynia State Police Department there were 66 employees, i.e. only one person more than in the previous year (AAN, zesp. 349, sygn. 1628, ss. 28–30). At the same time, in Department IV–D of Lviv State Police Department there were 58 employees, 42 – in Ternopil and 39 – in Stanislaviv, respectively (Misiuk A., 1998, s. 163). Such statistics, provided by the Polish researcher A. Misiuk, allows us to assert a certain increase in the number of employees in comparison with the state determined by the Main Directorate of the State Police at the beginning of 1922. At the same time, the statistical reports of Ternopil Voivodeship police territorial units for January of 1923 indicate that 15 employees worked in the agencies of Department IV–D of the specified administrative unit, in particular, 4 policemen in Skalat, 6 policemen in Ternopil, and 5 policemen in Husiatyn (SATR, f. 274, d. 1, c. 549, pp. 3, 13–14).

**The Conclusion.** During their short-term activity, the branch offices of Department IV–D could not skillfully fulfill their duties and ensure safety in a social and political sphere. A difficult economic situation contributed to the growth of the labour movement and activation of communist elements, which greatly threatened the state system of that time. Dissatisfaction with the “new Polish government” was also manifested by the national minorities of the region under analysis, primarily the Ukrainians, who testified to their anti-Polish sentiments, which was especially intensified in the context of the issue of determining the international status and statehood of Eastern Galicia. There were also serious misunderstandings of competence both between Department IV–D and the administrative authority, and within the structural subdivisions of the Ministry of Internal Affairs. As a result, all these factors led to the termination of this special unit and the creation of a new security structure – the Information Service, which had similar tasks but a different system of subordination. The organization of Department IV–D on the territory of Volhynia and Galicia requires in-depth studies, in particular, regarding the national and religious structure of personnel, their professional training, work methods, etc.

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**MATERIAL, MEDICAL AND SOCIAL SECURITY OF INSPECTORATES  
OF THE CUSTOMS GUARD OF THE DIRECTORATE OF DUTIES IN LVIV  
(the mid-1920s)**

**Abstract.** *The purpose of the study is to analyse the material, medical and social security of inspectorates of the customs guard of the Directorate of Customs in Lviv in the mid-1920s. The methodology of the research is based on the principles of historicism, objectivity, science and consistency. The methods of generalization, quantitative, historical and comparative, chronological, retrospective have been applied. An important place is given to the method of local history with the identification of the peculiarities of the material, medical and social state of inspectorates of the customs guard of the Directorate of Customs in Lviv during the period of mid-1920s. The scientific novelty consists in the research of the topical scientific issue that covers material, medical and social state of inspectorates of the customs guard of the Customs Directorate in Lviv during the period under analysis.*

**The Conclusion.** *The material security of customs officers has been analysed. It has been determined that problems with the provision of uniforms arose among lower officials of customs guard inspectorates, due to insufficient funding from the state. The issues of occupational diseases, medical*



and social protection and abuses related to obtaining paid leave on the basis of medical certificates are covered. It has been found out that in addition to temporary suspension from performance of official duties, customs officers were subject to material and disciplinary penalties, punished for offenses committed, such as: non-compliance with the provisions of the charter, violation of safety regulations, unauthorized leaving of the place of service, assistance to smugglers in illegal border crossing and transportation of goods, etc. It has been proved that a low level of material security for functionaries of the customs guard led to the acquisition at their own expense of certain elements of uniforms, the use of personal small arms, ammunition and dogs for official purposes.

**Key words:** Directorate of Customs in Lviv, inspectorates of customs guards, customs guard, disciplinary action, material incentives.

## РЕЧОВЕ, МЕДИЧНЕ ТА СОЦІАЛЬНЕ ЗАБЕЗПЕЧЕННЯ ІНСПЕКТОРАТІВ МИТНОЇ ВАРТИ ДИРЕКЦІЇ МИТ У ЛЬВОВІ (середина 1920-х рр.)

**Анотація.** *Мета дослідження* полягає в аналізі речового, медичного та соціального забезпечення інспекторатів митної варті Дирекції мит у Львові всередині 1920-х рр. **Методологія** базується на принципах історизму, об'єктивності, науковості та системності. Використано методи узагальнення, кількісний, історико-порівняльний, хронологічний, ретроспективний. Важливе місце відведено методу локальної історії з виявленням особливостей речового, медичного та соціального забезпечення інспекторатів митної варті Дирекції мит у Львові всередині 1920-х рр. **Наукова новизна.** Досліджено актуальну наукову проблему – речове, медичне та соціальне забезпечення інспекторатів митної варті Дирекції мит у Львові окресленого періоду.

**Висновки.** Проаналізовано речове забезпечення працівників митних органів. Зауважено на тому, що проблеми із забезпеченням обмундируванням виникали в середовищі нижчих посадових осіб інспекторатів митної варті, зважаючи на недостатнє фінансування з боку держави. Висвітлено питання “професійних” захворювань, медичного та соціального захисту і зловживань, пов'язаних з отриманням оплачуваних відпусток на підставі медичних довідок. З'ясовано, що, крім тимчасового відсторонення від виконання службових обов'язків, на працівників митної варті накладали матеріальні та дисциплінарні стягнення, їх карали за вчинені правопорушення, як-от: недотримання положень статуту, порушення техніки безпеки, самовільне залишення місця несення служби, допомогу контрабандистам у нелегальному перетині кордону і перевезенні товарів тощо. Доведено, що низький рівень забезпечення функціонерів митної варті сприяв придбанню ними за власні кошти окремих елементів форменого одягу, використанню у службових цілях особистої стрілецької зброї, набоїв та собак.

**Ключові слова:** Дирекція мит у Львові, інспекторати митної варті, митна вартя, дисциплінарне стягнення, матеріальне заохочення.

**The Problem Statement.** Customs control bodies are an important component of the state functioning, which ensure a stable flow of funds to the state treasury, control the legal movement of goods and citizens. The scientific issue under analysis is topical for modern understanding and analysis of complex processes that took place in interwar Poland under the conditions of the growing economic crisis of the “sanitization regime” in the 1920s, which was reflected in the functioning of customs authorities, a low level of material, medical and social support of customs inspectorates of the Directorate of Customs in Lviv.

**The Analysis of Recent Research and Publications.** Despite its topicality, the issue under analysis has not become the object of a comprehensive study by scholars. The research of N. Sai, who analysed the formation and development of customs control in the western Ukrainian lands from the 9th century, is more relevant to the analysis of the issue under study – until the 90s of the 20th century (on the materials of Lviv customs control office) (Sai, 2011). S. Filyppova, E. Maslennikov and K. Ivanova characterized the development of customs control in Ukraine (Filyppova, Maslennikov & Ivanova, 2012, pp. 98–101). Singling out five

periods of its progress, the third one ends with the beginning of the 20th century, the fourth one – with the Soviet period. That is, the functioning of the customs control bodies in Poland is not even discussed, let alone the fact that researchers do not single out the interwar period – an important component of the functioning of customs control bodies on the Ukrainian territory. T. Tuchak, having described customs control issue in the Russian and Austro-Hungarian empires, presented the Soviet era as the next period (Tuchak, 2018, pp. 134–138). The lack of periodization associated with singling out of the interwar period is characteristic not only of scientific papers, but also of educational literature for students of higher education (Krysovatiy, Herchakivskyi, Demianiuk, etc., 2014). S. Rusenko analysed the state provision of protection of the eastern border of interwar Poland (Rusenko, 2012, pp. 55–56). O. Malozhon – the origin and development of customs control bodies in Ukraine (Malozhon, 2017, pp. 143–147). B. Hud analysed the history, modernity and prospects of the Ukrainian-Polish border (Hud, 2019, pp. 125–136). The researches of S. Humennyi focus on the study of the so-called “the Zbruch border” (Humennyi, 2019, pp. 137–150; Humennyi, 2021). I. Pater and O. Muravskyi did research on the historical survey of the Ukrainian-Polish borders and ethnic boundaries (Pater & Muravskyi, 2019, pp. 151–190). The analysis of historiography makes it possible to draw a reasonable conclusion that there are currently no researches on the study of material, medical and social security of the customs guard inspectorates of the Customs Directorate in Lviv during the period under study. The basis of the source base is the archival files of Fund 162 “Directorate of Customs, Lviv. 1922 – 1939” of the Central State Historical Archive of Ukraine, Lviv (CSHAUL), the periodicals “The Dilo” (Hospodarska ruina Polshchi, 1925, p. 2), “Gazeta Lwowska” (1926, p. 1), “Ilustrowany kuryer godzienny” (1920, p. 10), official gazette of the Ministry of Finance “Monitor Polski” (1924, p. 1).

**The purpose** of the research is based on the analysis of material, medical and social security of the customs guard inspectorates of the Directorate of Customs in Lviv in the 1920s. To realize the goal, the following main objectives have been outlined: to do elucidate the problems with providing uniforms among lower officials of customs inspectorates, taking into account insufficient funding from the state; to highlight the issues of “professional” diseases, medical and social protection and abuse, related to receiving paid vacations based on medical certificates; to find out the problem of non-compliance with the provisions of the statute, violations of safety equipment, arbitrarily leaving the place of duty, helping smugglers in illegally crossing the border and transporting goods, etc.

**The Results of the Research.** The main task of the customs guard, as an executive body of tax authorities, and in particular, customs, in accordance with the provisions of the law of Poland dated July 31, 1924 “On the Regulation of Customs Relations”, provided for the establishment of customs control over goods and movement in the border zone, disclosure and fight against criminal acts provided for by normative legal acts on customs affairs and foreign trade in goods, detection of smuggling (CSHAUL, f. 162, d. 1, c. 23, p. 67). It is legally regulated that the customs line is a border line that separated its territory from foreign countries. Customs control – the place of collection of due duties and taxes, customs procedure at border line (CSHAUL, f. 162, d. 1, c. 23, p. 67), which led to oppression of the local population and certain restrictions (CSHAUL, f. 162, d. 1, c. 19, p. 94). The regulation on border protection provided for the determination of state borders and border zones, customs control points (CSHAUL, f. 162, d. 1, c. 20, p. 70).

The material support of the customs guard corps occupied an important place in the system of state authorities functioning in Poland, as it indicated not only their status, but also

level of authority. The Directorate of Customs in Lviv took care of eight inspectorates of the customs guard in Zalizhchyky, Sniatyn, Vorokhta, Dolyna, Sambir, Dukla, Nowy Sącz, Żivets (CSHAUL, f. 162, d. 1, c. 81, p. 3). Problems with the provision of uniforms arose among lower officials of the customs guard, especially when it was necessary to change uniforms. For example, in the majority of inspectorates of the customs guard, the period of wearing uniforms ended in 1925, so the administrative department of the border protection department of the Customs Directorate in Lviv provided uniforms to subordinate structures in Zalizhchyky (dress coats), Sniatyn (15 jackets, 15 pairs of trousers and 15 caps), Dolyna (3 coats, 3 jackets, 3 pairs of pants and 3 hats). The inspectorates of the customs guard were obliged to distribute uniforms to the lower employees of the customs guard (CSHAUL, f. 162, d. 1, c. 81, p. 1). In Sambir, 137 pairs of shoes whose wear life ended in 1926 were removed from the register (CSHAUL, f. 162, d. 1, c. 81, p. 9 v.). On January 30, 1926, in Sniatyn, 369 vests, completely unsuitable for use by employees, were “removed” from the register (CSHAUL, f. 162, d. 1, c. 81, pp. 12–12a). Instead, in Nowy Sącz the inspection deregistered a pair of shoes from the register (CSHAUL, f. 162, d. 1, c. 81, p. 12). In Dolyna – 2 old hats, 2 jackets, 2 pairs of pants were sold to the head of the customs guard Francisk Poliakow (CSHAUL, f. 162, d. 1, c. 81, p. 16a). In Dukla the inspection also removed from the register one woolen coat, one pair of pants, one hat. One short coat was bought by Alois Gerbe, for which the customs inspectorate demanded a refund of 29.33 zł (CSHAUL, f. 162, d. 1, c. 81, p. 16a).

In the report of the inspectorate of the customs guard in Sniatyn for January of 1926, it was reported that unusable clothing was removed from the register. In addition, all structures were allowed to display in the reports both individual elements of uniforms that were stored in warehouses and those that are “... absolutely inconvenient for official use” (CSHAUL, f. 162, d. 1, c. 82, p. 8a).

On February 19, 1926, the Directorate of Customs in Lviv recommended to the inspectorates to hand over for repair short jackets that were stored in warehouses and were not suitable for use. Expenses were covered by advance funds. According to our calculations, eight customs guard inspectorates had 660 such jackets: in Zalizhchyky – 35, in Sniatyn – 377, in Vorokhta – 85, in Dolyna – 19, in Sambir – 28, in Dukla – 18, in Nowy Sącz – 81, in Żivets – 87 (CSHAUL, f. 162, d. 1, c. 81, pp. 8–8a).

Considering the needs, the Ministry of Finance additionally sent 12 jackets, 12 sweaters, 12 pairs of pants, and 12 caps to the inspectorate in Sambir. They were supposed to be allocated to those officials who completed the term of wearing the previously given uniform (CSHAUL, f. 162, d. 1, c. 81, p. 14a). In addition, the Central Intendant of the Customs Guard sent 7 jackets, 7 pairs of pants, and 7 caps to the inspectorate in Dukla. The mechanism of distribution of uniforms was as follows: the senior inspector accounted for them and distributed them among the lower officials of the customs guard, whose term of wearing was coming to an end (CSHAUL, f. 162, d. 1, c. 81, p. 25). As evidenced by the analysis of archival sources, there were serious problems with the systematic provision of uniforms to employees of customs inspectorates. Thus, the inspectorate in Nowy Sącz deregistered a pair of shoes privately paid for by a former customs officer (CSHAUL, f. 162, d. 1, c. 81, p. 1a). In Sniatyn – a woolen jacket purchased with his own funds by a former bodyguard Grzeszyk, one pair of shoes paid for by an employee Stefan Stankiewicz (CSHAUL, f. 162, d. 1, c. 81, pp. 7, 11).

On March 13, 1926, the customs administration in Warsaw authorized the Customs Directorate in Lviv to sell unnecessary uniforms that had been used for two years (jackets, trousers and caps), woolen coats – for four years, as repair material at an approximate price

determined by the commission, which consisted of the head of the commissariat and two employees, not less than 1/24 of the initial cost (jackets, pants and hats) or 1/48 of outer clothing. The initial cost was the price listed in the Ministry of Finance's price list. The funds received from their sale were registered in the official journal in the category "miscellaneous income" (CSHAUL, f. 162, d. 1, c. 83, p. 1).

In return, the inspectorates of the customs guard did not receive new uniforms and shoes. There were cases of loss of uniforms. In particular, in the notice of the inspection from Živets there was mentioned the payment of compensation for one unreturned sweater (CSHAUL, f. 162, d. 1, c. 81, p. 25). Technical and support staff had problems with providing uniforms. On February 4, 1926, the inspectorate of the customs guard in Vorokhta allowed to give clothes from its stock to a horse keeper, clothes had to be washed and the buttons replaced with new ones (CSHAUL, f. 162, d. 1, c. 81, p. 13a). On February 23, 1926, in Sniatyn, the inspectorate of the customs guard excluded from register one coat, a jacket, a shirt, a pair of shoes, and a vest, purchased by a former bodyguard Jan Kubiak. In Dukla – a jacket, a pair of trousers, a hat, shoes in which the former bodyguard Josef Michno was buried (CSHAUL, f. 162, d. 1, c. 82, p. 4).

However, there was a problem not only with the provision of uniforms for lower officials of the customs guard, technical and support staff. Taking into account the weather conditions, the Ministry of Finance notified the Directorate of Customs in Lviv about the purchase of waterproof cloaks for customs officers. The cost of one set was 60 zł. (CSHAUL, f. 162, d. 1, c. 82, p. 2a). On February 4, 1926, the administrative department of the border protection department of the Customs Directorate in Lviv emphasized that eight inspectorates had received them. In particular, in Zalishchyky – 75, in Sniatyn – 142, in Vorokhta – 58, in Dolyna – 51, in Sambir – 66, in Dukla – 60, in Nowy Sącz – 109, in Živets – 117. A total of 678 pieces. Despite the sent waterproof cloaks, the inspectors at the posts had the first right to receive them "... with fewer waterproof coats will receive more cloaks" (CSHAUL, f. 162, d. 1, c. 82, p. 3). It is known that 10 additional waterproof raincoats were sent from Warsaw (CSHAUL, f. 162, d. 1, c. 82, p. 37), which did not solve the problem either.

The heads of the customs guard inspectorates were obliged to pay attention to the condition of waterproof clothing and to inform the Directorate of Customs in Lviv "about damage in order to impose appropriate compensation on the guilty parties" (CSHAUL, f. 162, d. 1, c. 82, p. 3). It was recommended that raincoats-capes be allocated exclusively for the cavalry units of the customs guard. "In case any of these officers shall be transferred from the cavalry to permanent service, the cape shall be given to the officer appointed in his place" (CSHAUL, f. 162, d. 1, c. 82, p. 37a).

Instead, high-ranking officials of the customs guard inspectorates were given allowances for uniforms and additional payments for its additions in the amount determined by law, they were paid systematically. It was about completing the uniform and keeping it in a condition that "corresponded to the status of an official". Due to these circumstances, they were not entitled to other benefits, such as: reimbursement of monetary payments (CSHAUL, f. 162, d. 1, c. 82, p. 29). On the basis of the order of the Ministry of Finance dated October 22, 1924, on the uniforms of senior officials of the customs guard, it was planned to allocate 215 zł for each high-ranking official in 1926 (CSHAUL, f. 162, d. 1, c. 82, p. 41a). According to our calculations, 38 employees, mainly inspectors, commissioners and deputy commissioners of eight customs guard inspectorates and the Directorate of Customs in Lviv, received the specified amount. The total amount was 8,170 zł. (CSHAUL, f. 162, d. 1, c. 82, p. 42–42a).

On February 15, 1926, the administrative division of the border protection management of the Directorate of Customs in Lviv informed of subordinate customs control units of the order of the Ministry of Finance No. 36, which referred to the limitation of expenses for the maintenance of customs guard inspectorates, taking into account the current economic situation in the country, which allowed to ensure only the needs, related to ensuring the functioning of state administration, and the Customs Directorate in Lviv had "... better to use the most far-reaching savings when giving open credits at the disposal of the Customs Directorate for some months" (CSHAUL, f. 162, d. 1, c. 82, p. 18). In the newspaper "The Dilo" it was written about the fact that "Poland is a young, undeveloped state, without big cities, without the latest industry and trade, mostly with a farming population that is at a very low level of culture, with territories destroyed by the war, without capital and savings, without overseas trade and colonies, with many unresolved internal issues ..." (Hospodarska ruina Polshchi, 1925, p. 2).

Despite a difficult economic situation, the Polish press and official government sources evaluated it with some optimism. Thus, in "Ilustrowany kuryer godzienny" it was written that back in the summer of 1920 "... industry has moved – unemployment is falling – banks are starting to lend. The authorities will fight to reduce prices and cost of production... Taxes are coming in more abundantly, wholesale prices tend to decrease, the state has started larger investments... The Ministry of Industry and Trade wants to take advantage of this emerging boom, consolidate it, and direct development to public roads" (Położenie gospodarcze Polski, 1920, p. 10). The price of gold stabilized. In particular, the value of 1 g of "pure" gold on August 26, 1924 was 3 zł. 44.11 groszy (Obwieszczenie, 1924, p. 1). "Gazeta Lwowska" reported on "... calmness at the foreign exchange market. Private banks are working. A Polish bank has USD 75,000 in cash ..." (Gazeta Lwowska, 1926, p. 1). There was a certain increase in the zloty exchange rate. In the official exchange, 57.10 guilders can be exchanged for 100 zł. The turnover on August 19, 1926 amounted to 100,000 zł. in cash, 116,000 zł was withdrawn from accounts (Gazeta Lwowska, 1926, p. 1).

Instructions were added to Order No. 36 regarding compliance with its main provisions, submission of requests for coverage of expenses not related to the functioning of customs structures. In particular, one-time sums transferred to inspections and commissions were to be used as economically as possible. Thus, all advances, "... whether for the cost of rope or other pallet expenses, must be used without exceeding anything else, so long as no applications are made" (CSHAUL, f. 162, d. 1, c. 81, p. 18). The Customs Directorate in Lviv expected significant cost savings from this order. For example, for shipments that contained registration cards, it is recommended to use exclusively all accounts of expenses for the travel and movement of customs officials. "If one sheet of printing is not enough to present all the information, you should not use the next sheet, but plain white paper" (CSHAUL, f. 162, d. 1, c. 81, p. 18a).

The Directorate of Customs in Lviv obliged the inspectorates of customs protection to submit reports on the condition of means of transportation – bicycles (CSHAUL, f. 162, d. 1, c. 82, p. 1a). An inspection of official bicycles – means of transportation of customs guards in Živets and Czyznie inspectorates confirmed the unsatisfactory condition of the tires, determining the need to purchase new ones. However, the Directorate of Customs in Lviv, taking into account Order No. 36 and a difficult economic situation and budget restrictions, emphasized the coverage of the most necessary expenses (CSHAUL, f. 162, d. 1, c. 82, p. 20a). Despite the cost savings, on February 12, 1926, the Customs Directorate in Lviv



compensated the travel expenses to the customs guard inspectorates in Zalishchyky, Sniatyn, Dukla, Nowy Sącz, and Živets for 130 zł each. 150 zł each – in Vorokhta, Dolyna and Sambir (CSHAUL, f. 162, d. 1, c. 82, pp. 14–14a). It was planned to increase the salary of a horse keeper of the customs guard of the inspectorate in Dukla, Jozef Kurowijski, by 15 points per month (approximately 6.45 zł – the authors' note) (CSHAUL, f. 162, d. 1, c. 82, pp. 14–14a). The caretaker of the so-called “watch horses” of the same inspectorate, Josef Gurowski, received an additional payment in the amount of 44 points (approximately 42 zł – the authors' note) (CSHAUL, f. 162, d. 1, c. 82, p. 3a). On February 8, 1926, the Customs Directorate in Lviv reported on 64 official positions, including 1 security guard-inspector, 4 inspectors, 5 security commissioners, 37 commissioners, 17 deputy commissioners, other functionaries – 1,627 (CSHAUL, f. 162, d. 1, c. 82, p. 8). In particular, the following officials worked in the customs guard inspectorate in Sniatyn: 1 (rank VII), 5 (rank VIII), 5 (rank IX), 31 (rank XI), 284 (rank XIII). The office of the inspectorate included one official of VII and IX ranks, Kuty commissariat – one of VIII and IX ranks, the department in Fereskul – of XII and four of XIII ranks (CSHAUL, f. 162, d. 1, c. 82, p. 8). In Sambir: in the chancellery one each of VII and IX ranks. In Dukla – 1 (rank VII), 4 (rank VIII), 2 (rank IX), 21 (rank XI), 36 (rank XIII); the office of the inspectorate – one each of VII and VIII ranks, Kremna commissariat – 2 (rank XI), the department in Oslawiec – 1 (rank XII) and 4 (rank XIII) (CSHAUL, f. 162, d. 1, c. 82, p. 8a). In Nowy Sącz – 1 (rank VII), 7 (rank VIII), 2 (rank IX), 37 (rank XI), 162 (rank XIII), offices – one each of VII and VIII ranks, Miszun commissariat – 2 (rank VIII), department in Magor – 1 (rank XII) and 4 (rank XIII) (CSHAUL, f. 162, d. 1, c. 82, p. 8a). In Živets – 1 (rank VII), 5 (rank VIII), 3 (rank IX), 32 (rank XI), 197 (rank XIII), the chancellery – one each of VII and VIII ranks, Czyzne commissariats – 1 (rank IX), Lipnice – one each of VIII and IX ranks, Korbelow – 1 (rank IX), Usoly – 1 (rank VIII) (CSHAUL, f. 162, d. 1, c. 82, p. 8a). Despite the need to replenish the staff of the Customs Guard, the circulars of the Ministry of Finance recommended that all promotions to higher ranks and recruitment of new officials be suspended until further notice, which remained in force (CSHAUL, f. 162, d. 1, c. 82, p. 9). It is likely that it was about saving money in connection with a difficult economic situation, therefore it was practically impossible to provide such a number of customs officers with high-quality uniforms.

No less difficult was the problem of granting vacations on the basis of presented medical certificates. On January 3, 1926, the customs inspectorate in Dolyna reported to the Customs Directorate in Lviv that the security guard Franzyszek Borowski, on the basis of a medical certificate, was granted a two-week leave due to illness, the beginning and end date of which was determined by the inspectorate. The dates of the beginning and return from leave were submitted in one report. The customs guard inspectorate in Sambir also, based on a medical certificate, granted a six-week leave to Jozef Novak. The Customs Directorate in Lviv recommended sending a letter with a doctor's decision regarding his health, and “... but not a card with a prescription for treatment” (CSHAUL, f. 162, d. 1, c. 82, p. 2). Of course, there were certain abuses in the matter of receiving two weeks, three weeks, or five weeks, or even six weeks of a paid medical leave. Such people were re-directed by the inspectorates of the customs guard to the state clinics doctors to confirm the diagnosis of the disease with the corresponding conclusion (CSHAUL, f. 162, d. 1, c. 82, p. 34a). Provision of a three-week sick leave based on a medical certificate was determined by a structural unit (CSHAUL, f. 162, d. 1, c. 82, p. 36). On February 17, 1926, the customs guard inspectorate in Sambir granted a guard Oleksandr Shepanov a five-week leave based on a medical certificate. After

returning to duty from the leave, "... he will send a separate letter, not an advisory card, to the government doctor with a request to decide whether he is fit for further service in the customs guard" (CSHAUL, f. 162, d. 1, c. 82, p. 43). First of all, this is related to the replacement of duties by other employees. For example, the customs guard inspectorate in Dolyna was obliged to send one guard temporarily (CSHAUL, f. 162, d. 1, c. 82, p. 39). On January 12, 1925, the inspectorate of the customs guard in Dolyna seconded a senior official, Francisk Domowych, while Stanislaw Taczala was on vacation (CSHAUL, f. 162, d. 1, c. 82, p. 39).

In Vorokhta the inspectorate noticed that some employees demanded from subordinates to add to the certificate the compensation of the treatment cost at a private doctor. However, the inspectorate reported that such a certificate was submitted only to the application for reimbursement of childbirth expenses. Instead, the applicant submitted information about his tenure and rank to the certificate of compensation (CSHAUL, f. 162, d. 1, c. 82, p. 27). Thus, after returning from leave, a guard Józef Hus was sent to the state doctor for recognition of a professional suitability for a further service in the customs guard (CSHAUL, f. 162, d. 1, c. 82, p. 3a). The inspectorate in Sambir refused to let Jan Filipovych go on vacation, considering that he is "lazy at work", he was dismissed at his own will. The inspectorate in Sambir was entrusted with the fulfillment of all formalities related to his being fired (CSHAUL, f. 162, d. 1, c. 82, p. 2). On February 28, 1926, Andrzej Lukarsz and Stanislaw Diliaga were dismissed from service in the customs guard corps at their own request (CSHAUL, f. 162, d. 1, c. 82, p. 30).

On February 23, 1925, the administrative department of the border protection department of the Directorate of Customs in Lviv reported on the analysis of information from the inspectorates regarding employee illnesses. The main ones were respiratory and rheumatic diseases associated with service in mountainous areas, sudden changes in temperature, cold, etc. (CSHAUL, f. 162, d. 1, c. 82, p. 33). On the other hand, it is worth noting a low quality of uniforms and food, compliance with the simplest hygiene recommendations. "The clothes are sometimes worn out a lot, you can't buy a vest with sheepskin sleeves ..." (CSHAUL, f. 162, d. 1, c. 82, p. 33a). The majority of the guards of the customs guard were fed "... very poorly and unwisely not because they cannot get food; chicken, dairy products and even meat can be got in every town ..." (CSHAUL, f. 162, d. 1, c. 82, p. 33a). According to the Directorate of Customs in Lviv, nevertheless, the main reason for the illnesses of customs guards was that they "... save their health expenses for other, perhaps fair, but necessary expenses, for example, uniforms, fashionable, elegant shoes, perfumes, illegal drinking, playing cards ..." (CSHAUL, f. 162, d. 1, c. 82, p. 33a). Nevertheless, the Directorate of Customs in Lviv did not recommend that the guards of the customs guard should start their service without a full meal and good clothes, if necessary, seek for a medical help (CSHAUL, f. 162, d. 1, c. 82, p. 33a). Summarizing, it was noted that, upon entering the service of the customs structures, the future employee undertook to "honestly and zealously perform it", to have a high level of a physical development, sufficient qualifications. Instead, a guard received a reward from the state for years of service upon retirement. If he could not perform his official duties, he was subject to dismissal from the customs authorities (CSHAUL, f. 162, d. 1, c. 82, p. 33a). Usually, employees who violated the regulations of the statute, their official position, were subject to dismissal. Thus, in February of 1926, Stanislaw Mamut, the senior inspector of the train inspectorate in Sniatyn, and a guard Teofil Merzhii, who voluntarily left the place of duty, helped smugglers illegally cross the Romanian border and transport alcohol, were dismissed (CSHAUL, f. 162, d. 1, c. 82, pp. 45–45a). In Sambir the inspectorate reported that Stanislaw Kolodziejski voluntarily left the place of duty for two days, violated the disciplinary

measures of the customs guard by his actions and received a reprimand (CSHAUL, f. 162, d. 1, c. 82, p. 29a). During the service, a guard Karol Romik from Nowy Sącz inspectorate, Niedzik police station, voluntarily left the place of service, during that period he was beaten by unknown people. The specified inspectorate made a decision to prohibit the payment of salary in the amount of 63.96 zł. during absence at the place of service. (CSHAUL, f. 162, d. 1, c. 82, p. 39a). The analysis of border inspection reports shows that some heads of customs inspectorates and judicial panels did not observe the time allotted for customs inspection, set out in the circular dated June 25, 1925. The inspector's work included time on duty, such as: visits to the inspectorate, district office, purchase of fodder for horses, etc. (CSHAUL, f. 162, d. 1, c. 82, p. 1). In order to avoid misunderstandings regarding the rules for calculating time for inspectors, it is ordered: if the absence of the head of the inspection is connected with the control of the border outfit and lasted 24 hours and more, each day spent outside the duty station is counted as one day of inspection service. Being off duty for less than 24 hours can be counted as one inspection day in cases when the business trip lasted 8 hours including travel (CSHAUL, f. 162, d. 1, c. 82, p. 1).

In the service register the head of the customs inspectorate recorded the time of the inspector's arrival at the facility and the performance of duty. Instead, the admission to the inspection service of time spent on other matters not related to those mentioned were the basis for disciplinary investigations. The head of the commissariat was also obliged to record the time of the employee's stay with and outside the inspection in the service register (CSHAUL, f. 162, d. 1, c. 82, p. 1a). In addition to temporary suspension from the performance of official duties by means of disciplinary sanctions, material sanctions were imposed on customs service employees. For example, they did not receive an increase in financial support by 44 points of paid sick leave, a bonus in the amount of three months' salary, etc. "Therefore, they will do the most prudent thing when they leave the service, before putting their health and even their lives at risk" (CSHAUL, f. 162, d. 1, c. 81, pp. 34–34a).

Cases of violation of instructions by higher officials were not rare. In particular, the customs guard inspectorate in Vorokhta, Yablunytsia commissariat, informed the Customs Directorate in Lviv about the deregistration of service horses (CSHAUL, f. 162, d. 1, c. 81, p. 28a). On February 25, 1926, the administrative department of the border protection management of the Customs Directorate in Lviv, in Order No. 45, imposed a monetary fine on the inspector and manager in Nowy Sącz, Gustaw Marszałek, and the commissioner of Zakopane, Markiyan Jurkowski, in the amount of half the amount of 292.95 zł. as compensation for the value of a service horse that should have been sold due to negligence in the performance of duties. In particular, the mentioned above officials, while on duty, on November 3, 1925, allowed the service horses to be harnessed without brakes, which caused them physical injuries during the descent from the hill. After that, one of the service horses was sold due to unfitness for service for 191.55 zł., while the purchase price of a horse was 550 zł. in August of 1924 (CSHAUL, f. 162, d. 1, c. 81, p. 39a).

The amount of compensation is determined by the value of a horse at the time of the accident at the level of 550 zł, it is reduced to 15% of the total value, i.e. 82.50 zł. from the time of purchase and operation of a horse, for another 174.55 zł., actually received from the auction sale of a horse, after covering the expenses at the auction. The Directorate of Customs in Lviv recommended that all employees of customs inspectorates be familiarized with the content of the order and warned against the consequences of mishandling service horses (CSHAUL, f. 162, d. 1, c. 81, p. 39). In accordance with the order of the Ministry of

Finance dated February 24, 1926, inspectors submitted reports on the sale of service horses at auction, attaching their account card (CSHAUL, f. 162, d. 1, c. 82, p. 1a). There are examples of the desire to serve in the customs guard corps, renewal of the position held, etc. There were even “black lists” of people who were prohibited from being recruited into the border guard. Officers and ordinary ranks underwent an annual retraining (Sai, 2011, p. 66). Thus, on November 27, 1925, Michal Malec tried to join the customs guard corps. The Directorate of Customs in Lviv demanded an opinion from the state police in Rava-Ruska regarding “the behaviour of the plaintiff in political and moral terms”. The administration of the customs department recommended the qualification commission to summon him to submit the necessary documents (CSHAUL, f. 162, d. 1, c. 70, p. 107). On February 15, 1926, the Lviv Court of Appeal did not satisfy the request of the former security guard of the Customs Guard Inspectorate in Sniatyn, Bronislaw Voityna, to be reinstated in his post (CSHAUL, f. 162, d. 1, c. 81, p. 14a). On February 28, 1926, Franzisk Poprawa was dismissed from service at the customs guard inspectorate at his request in Živets (CSHAUL, f. 162, d. 1, c. 81, p. 17). In February of 1926, on the basis of Article 116 of the statute of February 17, 1922, regulations on the state civil service and Order No. 38 of the administrative department of the border protection management of the Customs Directorate in Lviv, Stanislaw Styła was dismissed with severance pay in the amount of three months’ salary. The inspectorate in Živets, the Usola commissariat, had to prepare the relevant order no later than February 28 of the current year. The Usola commissariat had to return the salary assigned to Stanislaw Styła to the Customs Directorate in Lviv, with a subsequent termination of salary calculation (CSHAUL, f. 162, d. 1, c. 81, p. 22).

The Directorate of Customs in Lviv submitted a request to the Ministry of Finance regarding the assignment of financial assistance to relatives and employees of the customs guard in connection with child birth, death of relatives, compensation for travel expenses. In particular, on February 5, 1926, the Ministry of Finance notified the administrative department of the border protection department of the Directorate of Customs in Lviv regarding the appointment of a two-year severance pay to the widow of a former customs guard, taking into account the provisions of Article 74 of the law on providing for pensioners who are entitled to additional economic payments (CSHAUL, f. 162, d. 1, c. 81, p. 4). Thus, a bodyguard Franciszek Wasylewski had a third child, a daughter Sofia-Teresa, so he was given a financial assistance with an increase in his monthly salary by 44 points per month. Vincent Petrowski was also provided with financial assistance in connection with the birth of his first child, the son of Meczyslaw-Konrad (CSHAUL, f. 162, d. 1, c. 81, p. 6). On February 1, 1926, Wojciech Borowiecki, a guard of the customs guard of the Krempna commissariat, was given financial assistance in the amount of 44 points per month to his salary in connection with the birth of his first child, a son Frederik. Boleslaw Sukhorski, a guard of the customs guard in Novy Sącz, in connection with the birth of his son Kazimir-Boleslaw, was also provided with a financial assistance (CSHAUL, f. 162, d. 1, c. 81, pp. 10–10a).

The inspectorate in Zalizhchyky, Melnytsia commissariat provided material assistance to Wladyslaw Nallysnykow in connection with the death of his daughter Albina on February 7, 1926. Since March 1 of the current year, he had been assigned assistance in the amount of 44 points per month (CSHAUL, f. 162, d. 1, c. 81, p. 44a). In January of 1926, in connection with marriage, the inspectorate in Sniatyn, Kuta commissariat, provided material assistance to guard Francisk Gostomorzekow, and to Vavryn Dziabkow, a guard of the customs guard inspectorate in Živets, also on the marriage occasion, an increase in the monthly payment

by 44 points per month (CSHAUL, f. 162, d. 1, c. 81, p. 16a). It is appropriate to note that without the authorities permission, the personnel were prohibited from making acquaintances, being in the company of civilians, as well as marrying without first submitting a report to the superior indicating the biographical data of the future wife (Sai, 2011, p. 66). Such examples were numerous. In particular, on January 27, 1926, a customs guard in Sniatyn, Albin Shudem, received permission to marry Sofia Dobras, a daughter of Jan and Maria Kajeczak (CSHAUL, f. 162, d. 1, c. 72, p. 12). On February 27 of this year, Mykola Shedem, a security guard at the inspectorate in Sniatyn, was granted permission by the administrative department of the border protection department of the Customs Directorate in Lviv to marry Maria Grzesetcka, the daughter of Ignatius and Anna Polokh (CSHAUL, f. 162, d. 1, c. 70, p. 6). On the other hand, Julian Bernacki, a security guard of the inspectorate in Sambir, was not allowed to marry Anna Lisowska, a daughter of Jan and Maria Rogowski (CSHAUL, f. 162, d. 1, c. 81, p. 3 v.). Wladyslaw Kaminski, a customs guard in Sambir, was not allowed to marry either (CSHAUL, f. 162, d. 1, c. 82, p. 10). Anthony Novak, the guard of the customs guard of the commissariat in Dukla, did not receive a marriage permit either (CSHAUL, f. 162, d. 1, c. 82, p. 2). Instead, Jan Lukaszewski, a customs guard in Nowy Sącz, was allowed to marry Maria Ferenc. The following documents were submitted: a birth certificate, a social class “belonging” certificate, a court document on a marriage permit a birth certificate of a child out of wedlock (CSHAUL, f. 162, d. 1, c. 82, pp. 8a, 9).

In 1926, the construction of new premises remained a serious problem for the full functioning of the customs guard. However, the Ministry of Finance, given the insufficient amount of funds, could not decide on this issue at the time. It was decided to complete the renovation of the premises built in 1925, to refrain from negotiations regarding the acquisition of land plots necessary for construction until further orders. Nevertheless, the resolution of the Ministry of Finance dated January 9, 1926 provided for the acquisition of state-owned plots for the future construction of customs guard premises (CSHAUL, f. 162, d. 1, c. 82, p. 9). On January 29, 1926, the office of the Ministry of Finance informed the Directorate of Customs in Lviv that, taking into account a difficult general financial situation in Poland, the state limited spending on clerical needs to the most necessary requests, “... without the satisfaction of which the effectiveness of state power would be impaired” (CSHAUL, f. 162, d. 1, c. 82, p. 10a). Replenishment of the official inventory of the customs guard should take place only under exceptional conditions and with the permission of the Directorate of Customs in Lviv for the purchase of office furniture, upon carefully substantiated requests of the relevant inspection (CSHAUL, f. 162, d. 1, c. 82, p. 10a).

Transfers of customs officials were quite frequent. On January 29, 1926, the Ministry of Finance informed the Directorate of Customs in Lviv about the transfer of Deputy Commissioners of the Customs Guard from Myslowice, Bernhard Wywiol and Karol Oszukhowski. In particular, B. Wywiol was appointed to serve at the inspectorate in Dolyna, K. Oszukhowski – in Sniatyn – to the positions of assistant heads of commissars (CSHAUL, f. 162, d. 1, c. 82, p. 20a). On February 26, 1926, the administrative department of the border guard management of the Customs Directorate in Lviv, in accordance with the order of the customs guard inspectorate in Sambir, sent such guards – Stanislaw Labendzitski, Karol Tomys, to another place of service with reimbursement of expenses. There was no reimbursement of expenses in case of a bodyguard Wawzhyn Korts (CSHAUL, f. 162, d. 1, c. 82, p. 6). On the basis of the report of the guard of the customs guard in Živets, Jan Wtsisla, who served at the customs in Chornyi Dunayets, by March of 1926 he was to be transferred to the specified inspection to the border



service in the area of the railway station due to family circumstances with reimbursement of the transfer costs (CSHAUL, f. 162, d. 1, c. 82, p. 9). The inspectorate provided assistance to Felix Maletcki, the customs guard in Sambir, for the improvement of living conditions in Roztoki (CSHAUL, f. 162, d. 1, c. 82, p. 13). The Directorate of Customs in Lviv notified the inspectorate in Dukla, the commissariat in Komancha about the allocation of assistance to the security guard Stanislaw Rakhwal for renting housing after moving out of the apartment in Bilkut (CSHAUL, f. 162, d. 1, c. 82, p. 15).

On February 26, 1926, the administrative division of the border protection department of the Directorate of Customs in Lviv stated in Order No. 46 that a customs employee who rented an apartment in the premises of the Ministry of Public Works had the right to receive a subsidy with subsequent transfer of it as income to the state treasury. On the other hand, if a customs official used an official residence, financial assistance for communal services was given from the budget of the Ministry of Finance. "Due to the delay in the bills, notices of changes should be submitted as soon as possible when paying housing benefit or transfer, so that unwanted complications do not arise" (CSHAUL, f. 162, d. 1, c. 82, p. 41). On the basis of the order of the border protection administrative department of the Directorate of Customs in Lviv dated February 27, 1926 No. 47, eight employees of the customs guard were compensated for the cost of reimbursing the cost of housing rent (CSHAUL, f. 162, d. 1, c. 82, p. 44).

In some cases, transfer to another place of service was a punishment for committed offenses, non-compliance by customs guards with the provisions of the statute, violations of safety equipment, etc. Thus, on October 27, 1925, the inspectorate of the customs guard in Živets held a meeting of the guard reserve, to which an employee from Nowy Sącz arrived in a drunken state. He was detained, in accordance with the order of the presiding officer at the meeting, there was notified the commission of an offense incompatible with the "dignity of an officer in uniform" (CSHAUL, f. 162, d. 1, c. 82, p. 39). The offender was punished "in the manner of penitence without providing expenses for transfer to service" under the supervision of the customs guard inspectorate in Sambir, "where he must be transferred immediately after receiving the official salary for March of 1926, after determining the place of service" (CSHAUL, f. 162, d. 1, c. 82, p. 39v.). In the report of one of the inspectorates of the customs guard, it was said that the guards salute with weapons in their hands, do not remove them from their shoulders during the report, violating Articles 107, 342, 343, 353 of the statute (CSHAUL, f. 162, d. 1, c. 82, p. 4). On January 1, 1926, the customs guard had 2,900 carbines, of which inspectors had 250 in Zalizhchyky, 500 – in Sniatyn, 275 – in Vorokhta, 250 – in Dolyna, 300 – in Sambir, 275 – in Dukla, 500 – in Nowy Sącz, and 500 – in Živets. 500, in Krakow – 25, in Lviv – 25 (CSHAUL, f. 162, d. 1, c. 82, p. 4a). It was from this time that the Customs Directorate in Lviv introduced special registration cards for the purpose of identifying weapons and ammunition for them, which were owned by customs officers. The record required its careful filling with a mandatory signature of the person receiving the service weapon, its serviceability, etc. In the event of the weapon being returned to storage, as a result of the dismissal of an official from the service or its transfer to another customs office, the fact of the weapon being returned to storage was recorded in the record card. A similar situation is related to obtaining ammunition for weapons (CSHAUL, f. 162, d. 1, c. 82, p. 4a.).

The account card remained in storage at the customs office of a certain inspectorate. If the customs officer was transferred to the service territory of another inspection, it was necessary to send it to a relevant inspection. The new inspection, noting the dates in its own records, handed

them over to an authorized person for safekeeping. In case of dismissal from service, the card remained where the weapon was kept. Regular changes to the registration cards indicated both the transfer of customs officers to other inspectors and a proper state of service of weapons (CSHAUL, f. 162, d. 1, c. 82, p. 5). Any weapon damage detected by the inspector was recorded in the registration log every time, a corresponding protocol was drawn up with a mandatory indication of the main cause, as well as the involvement of the materially responsible person to cover the damage caused. If the weapon was damaged and there was no fault of a customs officer, then its repair was carried out at the expense of the Ministry of Finance (CSHAUL, f. 162, d. 1, c. 82, p. 5). Unsatisfactory maintenance of the customs guard corps affected the unsuitability of weapons maintenance facilities. Thus, on January 21, 1926, the inspectorate of the customs guard in Živets removed 322 tools for cleaning weapons from the register (CSHAUL, f. 162, d. 1, c. 82, p. 1). Other units also refused to use 246 weapons cleaning tools products (CSHAUL, f. 162, d. 1, c. 82, p. 1a). The inspectorate in Sambir “de-registered” 162 tools for cleaning weapons (CSHAUL, f. 162, d. 1, c. 82, p. 13a). In Dolyna – 126 tools for cleaning standard weapons, in Dukla – 98 (CSHAUL, f. 162, d. 1, c. 82, p. 23a). On January 28, 1926, the customs guard inspectorate in Sambir informed the administrative department of the border protection department of the Customs Directorate in Lviv about the use of 11 Mexican-made cartridges during the attack on customs officers by smugglers (CSHAUL, f. 162, d. 1, c. 82, p. 6a). The inspectorate in Nowy Sącz submitted a report on the removal from the register of eight bullets during the shooting at the shooting range in Guri Kalvariya. From the inspectorate in Zalizhchyky, it was reported that four bullets were used in the shooting range (CSHAUL, f. 162, d. 1, c. 82, pp. 6a, 10a). On February 6, 1926, the inspectorate in Živets was authorized to remove from the records 9 pistol bullets used by assistant commissioner Karol Doczkal in the shooting range of the Central Customs School in Gura Kalvariya. It turned out that the mentioned above official still fired 12 bullets, “... for 3 pistol bullets used by the above-mentioned person for purposes other than intended, he is demanded to cover their cost” (CSHAUL, f. 162, d. 1, c. 82, p. 13). On February 8, 1926, the inspector of the customs guard in Živets reported on the removal from the register of one Mexican bullets set “... to kill a rabid dog” (CSHAUL, f. 162, d. 1, c. 82, p. 20a). In Sambir, he “deregistered” 10 Japanese bullets and 5 Mexican bullets, paid for by senior guards Prevozny and Butch (CSHAUL, f. 162, d. 1, c. 82, p. 20a). On February 28, 1926, the inspection of the customs guard in Živets reported the removal from the register of eight Italian bullets used during shooting training at the shooting range in Gura Kalvariya. In Zalizhchyky – about the “deregistration” of three Japanese-made bullets used by an officer Lipitscki in shooting range (CSHAUL, f. 162, d. 1, c. 82, p. 10a). In Sambir – 5 bullets, 2 of Mexican and 3 of Japanese production, were deregistered (CSHAUL, f. 162, d. 1, c. 82, p. 13a). In Vorokhta – 3 bullets of Japanese production, used on duty by a security guard Pavlik and handed over to the court the materials of the criminal case against Dmytro Cherleniuk, who shot the mentioned above security guard twice (CSHAUL, f. 162, d. 1, c. 82, p. 13a).

In addition to the regular weapon prescribed by the instructions, customs officers were allowed to use personal weapon. Thus, on January 20, 1926, the Sniatyn elders granted permission to Mechyslaw Barow, an employee of the customs guard inspectorate, to possess own weapon of the “Steyer” system, caliber 8 mm while on duty and to use in exceptional cases, such as when searching homes. On February 22, 1926, the administrative department of the border protection department of the Customs Directorate in Lviv reported on the weapon and bullets allowed for official use, it was about the personal firearms of

the customs officers, which received the status of regular. In particular, the guards of the customs guard of the inspectorate in Auschwitz were allowed to use such personal weapon for official purposes. Stanislaw Bojak owned weapon of the "Parabelun" system (number 3512, caliber 8.65 mm), Marcyn Mroz – "Brewete" (number 13416, caliber 7.35 mm), Józef Gabryszczak – "Schmeiser" (number 777709, caliber 6.35 mm), Franciszek Turaszczyk – "Bulldog" (number 11138, caliber 7.35 mm) (CSHAUL, f. 162, d. 1, c. 82, p. 31). The inspectorate of the customs guard in Sniatyn allowed Roman Duzhakow to use a personal short-barreled firearm of the Browning Belgian "Browning belgijski" system (number 11297, caliber 6.75 mm) (CSHAUL, f. 162, d. 1, c. 82, p. 34a).

Based on the reports of the customs inspectorates, it is known that some customs officers used their own dogs for official purposes. The Directorate of Customs in Lviv recommended that customs officers learn the rules of training and use of dogs in the service. It was recommended to purchase the brochure "How to Use Police Dogs" by K. Grimm, the Commissioner of the State Police, Chief of the Department of Breeding and Training of Police Dogs of the Main Police Command at the price of 1.80 zł. without the cost of delivery. The mentioned brochure could be purchased at the House of Polish Books in Warsaw or in Lviv ("Book of Gubrinovycz"). In addition, the training of dogs is presented in the brochure "Training of Police Dogs" by Ja. Gajewski in more detail (2.50 zł.) (CSHAUL, f. 162, d. 1, c. 82, p. 22a). It is known that on February 12, 1926, in accordance with the order of the Ministry of Finance, the one-day amount for the maintenance of a service dog was 0.50 zł. – for food, fuel for its preparation and litter. Treatment costs were paid separately, the invoices sent were taken into account (CSHAUL, f. 162, d. 1, c. 82, p. 27a).

**The Conclusion.** The peculiarities of a material security of the employees of the customs authorities have been analysed. It was noted that uniforms were primarily allocated to lower-ranking customs officers. They had the opportunity to additionally purchase individual components of the uniform with their own funds or buy them back after deregistration. Problems with the provision of uniforms arose among the lower officials of the customs guard inspectorates, due to insufficient funding from the Ministry of Finance, which limited the costs of their maintenance by means of instructions. The authorities tried to overcome it, however, it was not possible to solve it completely during the period under analysis. Instead, in Lviv senior officials of the customs guard inspectorates of the Directorate of Customs received allowances for uniforms and additional payments for its additions in the amount established by legislation systematically. Savings of money related not only to clerical needs, but also to the use of the ban on purchase of new tires for official bicycles of the customs guard.

The issue of "occupational" diseases, medical and social security, and abuses related to obtaining paid vacations based on medical certificates have been covered. There was some abuse in the case of receiving two, three, or five weeks or six weeks of a paid medical leave. The inspectors of the customs guard sent such people to the doctors of state clinics to confirm the diagnosis of the disease with the corresponding conclusion. On this basis, the issuance of a certificate of incapacity for work was determined by a separate inspectorate of the customs guard. First of all, this is related to the replacement of duties by other employees. In addition to temporary suspension from official duties through disciplinary sanctions, customs officers were subject to financial sanctions, such as: refusal to increase the financial support by 44 points, paid leave due to health conditions, bonus in the amount of three months' salary, transfer to another place of service at the expense of own funds, etc. Often, transfer to another place of service was a punishment for committed offenses, non-compliance by customs guards with

the provisions of the statute, violations of safety equipment, etc. Despite the need to replenish the staff list of customs guards, the circulars of the Ministry of Finance recommended that all promotions to higher ranks and acceptance of new officials be suspended.

The development of the system of customs authorities required the construction of a certain infrastructure for the needs of the customs inspectorates, but the Ministry of Finance, considering the insufficient amount of funds, recommended to complete the repair of the premises built in 1925, to refrain from negotiations regarding the acquisition of land plots necessary for construction.

The issues of non-compliance by the customs guards with the provisions of the statute, quality maintenance of standard weapons, control over the use of ammunition, arbitrary abandonment of the place of duty, assistance to smugglers to cross the border illegally and transport alcohol have been highlighted. The Directorate of Customs in Lviv introduced special registration cards for the purpose of identifying weapons and ammunition for them, which were owned by customs officers. The account required its careful filling with the obligatory signature of a person who received a serviceable official weapon for use. In case of the carbines being returned to storage, as a result of the dismissal of an official from the service or his transfer to another customs office, the fact of the weapons being returned to storage was noted in the registration card. In some cases, customs guards were allowed to use personal firearms and their own dogs for official purposes.

Prospects for further research of the issue under analysis are determined by its analysis to identify the main trends related to the functioning of the Directorate of Customs in Lviv during the first half of the 1920s.

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**DAILY LIFE OF THE POPULATION OF SOVIET TRANSCARPATIA  
IN THE DOCUMENTS OF THE USA CENTRAL INTELLIGENCE AGENCY  
(SECOND HALF OF THE 1940s – EARLY 1950s)**

**Abstract.** *The purpose of the study is to investigate the peculiarities of the US intelligence’s vision of the processes of sovietization in Transcarpathia and their impact on the daily life of the region’s residents, based on the declassified CIA materials. The research methodology is based on the principles of historicism, scientificity, and objectivity that are fundamental for historians. It was also necessary to apply historical and systemic, historical and comparative methods of historical science, which allowed, first of all, to trace the specifics of the formation of images of the history of Transcarpathia in the assessment of CIA specialists in the context of the initial stage of the “Cold War”. The scientific novelty of the study consists in an effort to carry out a balanced and comprehensive analysis of the vision of*

the US intelligence on various aspects of the daily life of Soviet Transcarpathia population (processes of collectivization, a daily life of the population of the region's towns, activities of the authorities, etc.). The authors elucidated the content and a factual validity of these processes, showed their orientation and the main objects and lines of analysis. The set of documents analysed in the article is informative enough to fulfill the research objectives. **The Conclusion.** Despite the fact that the USSR was a strategic adversary of the USA during the Cold War, the information of the CIA specialists regarding the life of the population of Transcarpathia as a part of it is not one-sided in the framework of a possible "two-colour" analysis ("black and white"). In a number of relevant documents, sympathy for the population of the region is palpable, rather difficult conditions of its economic, political and cultural life in the first post-war years, a strict management style of the state and party leadership of Transcarpathia, a significant role of power structures, etc. have been emphasized. It is also important to recognize the Ukrainianness of the population of Transcarpathia, despite the presence of "mental" and "cultural" barriers among local residents and visitors, including those from the eastern regions of Ukraine.

**Key words:** everyday life, the USSR, the Ukrainian SSR, Transcarpathian region, the CIA, intelligence, information.

### ПОВСЯКДЕННЕ ЖИТТЯ НАСЕЛЕННЯ РАДЯНСЬКОГО ЗАКАРПАТТЯ У ДОКУМЕНТАХ ЦЕНТРАЛЬНОГО РОЗВІДУВАЛЬНОГО УПРАВЛІННЯ США (друга половина 1940 – початок 1950-х рр.)

**Анотація. Мета дослідження** – на основі розсекречених матеріалів ЦРУ дослідити особливості бачення розвідкою США процесів радянзації Закарпаття та їх впливу на повсякденне життя мешканців краю. **Методологія дослідження** базується на засадничих для вчених-істориків принципах історизму, науковості та об'єктивності. Також необхідним було застосування історико-системного й історико-порівняльного методів історичної науки, що уможливило насамперед простежити специфіку формування образів історії Закарпаття в оцінці фахівців ЦРУ у контексті початкового етапу "Холодної війни". **Наукова новизна** дослідження полягає у намаганні здійснити виважений і комплексний аналіз бачення розвідкою США різних аспектів повсякденного життя населення радянського Закарпаття (процеси колективізації, повсякденне життя населення міст краю, діяльність органів влади та ін.). Авторами розкрито зміст та фактичну обґрунтованість цих оцінок, показано їх спрямованість, головні об'єкти і лінії аналізу в них. Комплекс документів, проаналізованих у статті, є достатньо інформативним для реалізації завдань дослідження. **Висновки.** Попри те, що СРСР був стратегічним супротивником США в роки "Холодної війни", інформація фахівців ЦРУ щодо життя населення Закарпаття як його складової частини не має одностороннього характеру у рамках можливого "двоколірного" оцінювання ("чорне – біле"). У низці відповідних документів відчутним є співчуття до населення краю, підкреслюються досить нелегкі умови його економічного, політичного й культурного життя у перші повоєнні роки, жорсткий структурний стиль державного і партійного керівництва Закарпаття, значна роль силових структур тощо. Важливим також є визнання українськості населення краю попри наявність "ментального" й "культурного" бар'єрів між місцевими жителями та приїждженими, в тому числі зі східних областей України.

**Ключові слова:** повсякденне життя, СРСР, УРСР, Закарпатська область, ЦРУ, розвідка, інформація.

**The Problem Statement.** At the current stage of historical science development, the focus of researchers on the genesis of historical images grows, in particular the existence issue of these images at the intersection of everyday and theoretical scientific consciousness. In this context, in recent decades, the issue of images of the history of Ukraine in general and its regions in the analysis of the intelligence services of the world leading countries has attracted attention. An important feature of these services work was usually and still is the effort to provide the leadership of their states with the most complete and factually verified

information about the life of population in countries that are adversaries on the international arena. Thus, nowadays we observe the intensification of interest, in particular in the activities of the CIA (Central Intelligence Agency) of the USA.

The CIA was established on September 18, 1947. It can rightly be called the most famous secret service in the world. It should be noted that even during World War II, the FBI conducted some operations abroad. The Strategic Services Division, headed by General William D. Donovan, was also involved in it. In 1947, as part of the reorganized senior state leadership, the CIA was under the direct authority of the National Security Council, thereby eliminating individual inconsistencies and uncoordinated actions between the previous agencies. But still during the reformation, “in March 1946, the intelligence agencies of the army, navy, and air force received an order, together with the Central Intelligence Group, to give the most qualified intelligence analysis to the Soviet Union in a short period of time” (Yakovlev, 1980, pp. 63, 81). During the Cold War, the USSR became one of the main objects and fields of activity for the CIA. Its experts did not ignore the new territories that became part of the USSR after World War II. First of all, this concerned Transcarpathia, which at the end of the 1930s found itself at the intersection of the great powers’ interests.

However, the “Transcarpathian” issue still occupies a certain place in the ideological confrontation in modern international relations. In particular, an important circumstance is that with the beginning of the full-scale Russian-Ukrainian war, the Ukrainian historians intensified their opposition to the Russian propaganda, which operates with distorted historical narratives and uses biased scientific and pseudoscientific concepts of the Russian historians (Haliv & Sviontyk, 2023, pp. 262–263).

Under the conditions of the war, the special services of the aggressor country, together with the propaganda apparatus of this state, are actively working on the formation and promotion in the mass consciousness of artificially constructed stereotypes dangerous for the Ukrainian statehood about the non-Ukrainian character of Transcarpathia, about the existence of separatist centers on its territory, about the inevitability in the future successful steps taken by Ukraine’s western neighbours to capture part of the Ukrainian territories, etc.

Since the hostilities on the territory of Ukraine do not cease, and the Putin regime is constantly radicalizing the militant rhetoric, representatives of the Ukrainian academic community are forced to respond quickly to the events of the turbulent present, without having the psycho-emotional distance necessary for a deeper analysis, which makes it difficult to develop a proper stereoscopic vision (Telvak & Ilnytskyi, 2023, pp. 250–251). The study of the issue outlined in this article can serve as a suitable kind of research “distancing”, while shedding light in a number of important aspects on the historical roots of the current war.

The fundamental multi-level changes that took place in the historical science of Ukraine during the period of the 1990s – at the beginning of the 21st century are now indisputable. The specified changes concern, first of all, the revival of the Ukrainian scientific historical tradition and the formation of the latest scientific approaches and concepts, the accumulation of a wide array of the latest thorough knowledge of the history of Ukraine, in particular in the field of the study of an everyday life (for example, in the context of agrarian history). At the same time, a comprehensive theory of the history of an everyday life has not yet been created, although many specialists recognize that an everyday life is a special sphere of a human experience, that it has convincingly transformed from something not too serious in the reception of a scholar into an independent scientific field, a new method of scientific research (Kornovenko & Shamrai, 2023, pp. 277–278).

It is not surprising that so far there is no corresponding generally accepted, slender and internally consistent conceptual apparatus. The following concepts are used directly in the field of studying the history of an everyday life in post-war Ukraine: “the Soviet system”, “intelligentsia”, “material situation”, “wages”, etc. (Popp & Kantor, 2021, p. 162). Nevertheless, in a number of researches, the focus is on important structural components, the consideration of which serves to solve this problem as well. For example, among these components, on the example of the history of an everyday Ukrainian village of the second half of the 1940s – the first half of the 1950s (however, this model is in many respects also acceptable for urban studies), the following are highlighted: the living environment of the peasants, their production and household, educational, recreational and leisure spheres, as well as the degree of manifestation and completeness of all these aspects of a human life in the reception of contemporaries of the events of that time. Thus, not only the material and subject space of the inhabitants is researched, but also their actions, norms of behaviour, conditions for the formation of life positions, moral and psychological features, relations in society, the reasons for the choice of certain strategies of existence by different categories of the population in that complex and contradictory period of history (Kornovenko & Shamrai, 2023, p. 278). Regional features and social groups during different historical periods are also distinguished, which significantly complements and deepens the understanding of historical processes, shows them through the prism of the lives of individual people (Popp & Kantor, 2021, p. 162; Ilnytskyi & Holovko, 2021, pp. 265–266 ). This approach contributes to an integrated and conceptual understanding of the history of Ukraine as part of the world-historical process.

**The Analysis of Recent Research and Publications.** During the Soviet period, not so much was written about the activities of American intelligence. One of the most famous works is N. Yakovlev’s monograph “The CIA Against the USSR”, published in 1980. (Yakovlev, 1980). The author emphasizes the ideological aspect of American intelligence in it.

A real discovery for researchers was the declassification of the materials of the US Central Intelligence Agency and the provision of access to a wide range of readers without geographical restrictions. At the beginning of January of 2017, the CIA released about 12 million pages of documents relating to the agency’s activities from the 1940s to the 1990s (12 million, 2017). In total, approximately 930,000 documents were declassified and became available in the online library on the administration’s website. For example, the word “Ukraine” is mentioned in more than 11,000 declassified documents. The documents were partially censored, in particular, the names of respondents and agents mentioned in the reports were erased. According to the representative of the CIA, Heather Fritz Horniak: “Nothing was singled out. It is a complete story, with all the good and all the bad” (Yarova, 2017).

On the other hand, we can see that the Russian Federation, which arbitrarily declared itself the successor of the Soviet Union, has been resorting to the classification of documents since the mid-2010s, creating restrictions on access to “unwanted” information for its citizens. Thus, in 2016, access to the entire online archive of the Ukrainian liberation movement was prohibited on the territory of the federation (Putin-Stalin, 2016). In January of 2020, three years after the release of the CIA documents, some Russian propagandists, manipulating the facts for a domestic audience, tried to show “Bandera and his supporters as criminals and facilitators of the Nazis” (Sedov, 2020). The propagandists were very hurt that “the Ukrainian fascist and professional agent of Hitler, Stepan Bandera ... announced the restoration of the state of Western Ukraine in Lviv” (TsRU pokazalo, 2020) and they are trying in every way to discredit his name.

Information about the declassification of the CIA documents and materials was immediately spread by the leading Ukrainian mass media (Vus, 2017; Tyshchuk, 2017; Kuryshko, 2017; TsRU vyklalo, 2017; TsRU rozsekretylo arkhivy, 2017; TsRU rozsekretylo, 2017). The Ukrainian historians Maksym Mayorov, Pavlo Hai-Nyzhnyk, Volodymyr Viatrovych, an editor of the popular historical FB-resource “Wastelands of Eastern European Clio” Ivan Khomeniuk also shared their first impressions about the published documents. They noted that the value of access to the materials of the American special services provides an opportunity to look at long-known events from a new angle (Shurkhalo, 2017).

Recently some publications have already appeared, which are based on the declassified materials. These are scientific articles, journalistic essays, which present the view of American intelligence on the Soviet life in the capital (Kyiv) (Saliy, 2017), the regional centre (Rivne) (Marchuk & Bukhalo, 2022) and the regions (Cherkashchyna) of Ukraine (U zviti, 2017).

The declassification of the CIA materials aroused the interest of Transcarpathian journalists as well, who picked up and made public some declassified documents. Nowadays there are almost two dozen such publications. They related to the vision of American intelligence on various military and political, socio-economic and religious issues of the Soviet period (Rozsekrecheni, 2020; Tserkvy, 2018; Shcho znala, 2017). There are also publications that directly relate to the subject of our research – the changes that occurred in an everyday life of the population of Transcarpathia, caused by the sovietization of the region (Hlahola, 2017; Literati, 2017; TsRU oprylyudnylo, 2017; Rozsekrecheni arkhivy TsRU, 2017).

**The purpose of the article** is to do the research on the peculiarities of the US intelligence’s vision of the processes of sovietization of Transcarpathia and their impact on a daily life of the region’s residents, based on the declassified CIA materials.

**The Results of the Research.** In particular, the CIA had its own vision on the movement for the reunification of Transcarpathia with Soviet Ukraine. In May of 1953, the administration prepared the reference “The Past and Present Developments Concerning Carpatho-Ruthenia”. It indicated favourable reasons for the reunification movement – “disappointment with the Czechoslovak regime” and “hatred of the Hungarian occupation”, which led to the fact that the population of the region “viewed the Soviet Army as a liberation force in 1944”. Already “in November of 1944, a Council or rada was convened in Mukachevo and voted unanimously to join the USSR” (CIA-RDP80-00809A000600040072-8).

The CIA analysts noted that initially the reaction of the Transcarpathian population to the agrarian transformations initiated by the Soviet authorities, in particular the land reform, was positive, because before collectivization “the majority of the people led a sub-standard existence”. Intelligence believed that at the first stage of collectivization, there was no serious resistance from the population of Zakarpattia Oblast: “initial reaction to collectivization in the Carpathian oblast was likewise favourable and that there was no significant opposition to it as late as 1950 ... transformed the former estates into big collectives, many Ruthenians were therefore quite pleased. Although no detailed information is available on signs of opposition and even acts of sabotage against collectives which occurred during the last three years and indicate that the Ruthenian population (Ukrainian – Author) finally understood that any short-range gains under the Soviet system are elusive” (CIA-RDP80-00809A000600040072-8).

More complete and accurate is the report, in which there is done the research on the process of collectivization in Zakarpattia Oblast. It states that “no attempt at collectivization was made in the Carpatho-Ukraine until 1947. Up to that time the average farm consisted of 8 to 10 hectares, and anyone who owned more than that amount of land was considered a



kulak. ... never heard of any instance when a kulak was exiled to Siberia or any other place). The first collective farm was formed from among about 20 families of the Bulgarians who lived in the area. These Bulgarians were engaged primarily in raising fruits and vegetables, and they lived in a collective atmosphere. This first collective farm (1/n Dimitrova) was given all the equipment it needed and all necessary seed free of charge” (CIA-RDP82-00046R000100230004-1).

The document indicated that the harvest was far greater than these people had ever received. Since they were allowed to dispose of the products, at their own discretion, and keep all the proceeds, these Bulgarian families lived well, earning 80 – 100 thousand rubles a year. At the invitation of the government, these Bulgarian families built new houses on the main highway of Mukachevo. This, of course, was an attempt by the authorities to advertise the advantages of the collective farm system. And although some people were tempted to join the collective farm, the majority of them refused categorically (CIA-RDP82-00046R000100230004-1). Modern researchers are also inclined to the opinion that “collective farm named after Dimitrov simply did not fit into the “normal framework of collectivization”. The “standard” collective farm was mostly entered by poor people without means of production, and here, in Rosvyhov, only the cost of the greenhouse frames ... was at a price of 57,590 krb” (Mishchanyyn, 2000, p. 56).

The next attempt of the government to carry out collectivization (1947 – 1948) was in the area of Velyky Luchok, which had the best soils in the Transcarpathian region. As soon as the government organized a minimum number of volunteers, a collective farm was established. The land was given both to those who volunteered and to those who refused to join. By the end of 1948, about 20 collective farms had operated in Zakarpattia, mainly in lowland areas. They were also given machinery and seed material for free. These collective farmers were promised that they would be able to keep their entire harvest for the next five years, and the state did not demand any grain supplies from them. In 1948, members of these 20 collective farms earned 15–20 kg each grains per working day. In 1949, due to the imposition of various “necessary and urgent projects”, the payment was reduced to 12 kg. per working day. By 1950, this figure was reduced to 8 kg per working day, and in 1951 these people received only about 12 kg. per working day (CIA-RDP82-00046R000100230004-1).

By 1949, the Bolshevik government had achieved considerable success in the organization of collective farms throughout the territory of the Transcarpathian region. Some people joined the collective farms, believing the promises of the communists about “a huge pay for a working day, which the workers of these 20 collective farms received”. At the same time, the government resorts to tax pressure. Individual peasants who refused to join collective farms were taxed with heavy taxes, “they had to make grain deliveries to the state for the land which they claimed was theirs. It did these people no good when they protested that their land had been collectivized and that they had been forbidden to work on it. They were compelled to surrender much of their reserve grain or join the kolkhoz, so that quite a few of them gave in and joined. Another method employed by the government was to send recalcitrant farmers out to work in the forests during the winter” (CIA-RDP82-00046R000100230004-1).

The document notes that peasants were given unrealistic standards for the delivery of agricultural products, and “when they failed to fulfill these norms (which was almost always the case) they were brought to court on charges of economic sabotage”, and forced to join a collective farm. Agitators of the collective farm system also often used threats and direct intimidation to convince people to join collective farms. There were also many rumors that

the kulaks were going to be sent to Siberia, and this also prompted many to join the collective farms (CIA-RDP82-00046R000100230004-1).

It is concluded that by means of promises, persuasions, threats and even open violence, the government managed to collectivize about 90% of the land by the end of 1949. The villagers of Velyki Luchky never fulfilled their promise not to take their crops for five years. Also, they were given only one-quarter of a hectare of land for their own planting instead of the full hectare of land given to those who joined in the beginning. In 1951, those who joined the collective farm after 1948 earned only 200-300 grams of grain per working day (CIA-RDP82-00046R000100230004-1). And this is how modern researchers describe collectivization in this village: “The fifth collective farm in the region appeared on March 16, 1947 in the village of Velyki Luchky of Mukachevo district on the basis of 16 farms. The collective farm was allocated 150 hectares of the best land that belonged to sole proprietors. The latter was compensated with allotments, in particular at a distance of 18 km from the village” (Mishchanyn, 2018, p. 259).

The consequences of the first years of collective farming are described in more detail in the information report dated April 14, 1953: “People working in collective farms are so hungry that they steal potatoes by hiding them in their sleeves and shirts. People receive only black bread. Many cattle are dying of infections and the agricultural output is decreasing because of poor labour organization. In the last agricultural year, profits decreased by 30 percent. There is a scarcity of fertilizers and animal manure, and seeds are of poor quality. The Soviet agronomists try to compensate for this by the so-called “deep ploughing”. This year was abnormally dry and the corn and potato crops were catastrophic. Only the wheat crop was good. One kg of potatoes now officially costs three rubles, while last year it was only 80 kopecks” (CIA-RDP80-00810A000600490008-4).

The CIA also had enough information about the religious situation in Zakarpattia Oblast, in particular about the ban on the Greek Catholic Church and the fate of its bishop Theodor Romzha. It is noted that until 1947, Transcarpathia was inhabited by a large number of nations and peoples who could practice different religious beliefs freely and independently of the state. In 1945, when Transcarpathian Ukraine joined the Ukrainian Communist Party, the most common religious denominations were: the Greek Catholics, the Roman Catholics, the Jews, the Protestants, and the Orthodox. Until 1947, the Greek Catholic Church remained the most widespread and influential religious denomination in the region. As an example, it is given that almost 70% of Mukachevo residents, 80% of Uzhhorod residents, and 60% of Khust residents were the Greek Catholics.

The leader of the religious community, Bishop Teodor Romzha of Uzhhorod and Mukachevo, enjoyed a considerable authority and influence in the region, and his opinion was listened to in the Vatican as well. The Soviet special services monitored the situation and often reported it to Moscow (Lendyel, 2017).

When it became clear that it would not be possible to convince the bishop to join the Orthodox Church, the Soviet authorities, through their special services, resorted to murdering the bishop. This is how it is described in the CIA documents: “At that time (1947), the Greek-Catholic bishop left for the consecration of the temple in the village of Kaidanovo, which is 10 km from Mukachevo. On the way back, “unknown bandits” beat the bishop. After returning to Uzhhorod, he was hospitalized, but there are rumors that he was later poisoned” (Lendyel, 2017). Here, however, we have to make a clarification – T. Romzha was placed in Mukachevo City Hospital after the failed attempt. He died there after a nurse of this hospital gave him a lethal injection.

Analysts of the special service compared the bishop of the Mukachevo Greek Catholic Diocese, T. Romzha, with the Metropolitan of Halytskyi and the Archbishop of Lviv, Yo. Slipy, who was arrested by the Soviet authorities on April 11, 1945 and sent to Siberia together with other Ukrainian bishops. As noted in the secret document: “All the Ukrainian Catholic bishops were liquidated and, of those arrested, the majority died in prison, with the exception of the Uzhhorod Bishop Romzha who died in a reportedly faked motor accident in November of 1947” (AERODYNAMIC VOL. 25).

More details about the murder of T. Romzha became known only after the release of the memoirs of the employee of the Soviet special services, a spy and saboteur Pavel Sudoplatov, who was involved in its organization. According to him, in 1947, the Soviet special services received information from abroad that the Vatican was seeking the support of the American and British authorities to provide assistance to the Uniate Church and the “Bandera’s formations” associated with them. The information was passed not only to J. Stalin and V. Molotov, but also to M. Khrushchov, the first secretary of the Central Committee of the Communist Party of Ukraine. M. Khrushchov personally appealed to J. Stalin with a request to allow him to liquidate the Greek Catholic Church. In a letter to J. Stalin and the Minister of State Security of the USSR, V. Abakumov, M. Khrushchov and the Minister of State Security of the Ukrainian SSR S. Savchenko claimed that “Romzha actively cooperates with the leaders of the bandit movement and maintains contact with the secret emissaries of the Vatican, who are actively fighting against the Soviet authorities”, and also that “Romzha and his group pose a serious threat to a political stability in the region, recently annexed by the Soviet Union. Stalin agreed with Khrushchov’s proposal that “the time has come to liquidate the Vatican’s “terrorist nest” in Uzhhorod (Sudoplatov, 1998, pp. 412–414).

In the CIA documents it was noted that the population of Zakarpattia Oblast is the most opposed to the Soviet policy in religious matters: “Following the practice adopted earlier in Soviet Ukraine, the Soviet regime has suppressed the Catholic Church of the Eastern Rite in the Carpathian Oblast. All Catholic priests who would, not announce their subservience to the Orthodox Church lead an illegal existence in the country but it has been stated that they are supported ideologically and materially by many people”. Catholic masses are still being celebrated in the forests. Many Orthodox priests are considered as Moscow agents since it has become known that they use confessions to obtain denunciations of anti-Orthodox and anti-Soviet individuals” (CIA-RDP80-00809A000600040072-8).

Analysts of the special service pointed at another problem that appeared with the arrival of the Soviet power – Russification. For this, they use the term “Russianization”. This is how they write about it: “Russianization, which is being advanced all over the USSR, is as wholeheartedly opposed in the Carpathian oblast as Magyarization was some years ago” (CIA-RDP80-00809A000600040072-8). Russian became the official language. It was taught at schools, street signs were also in Russian. The local population tried to resist the Russian language, ignoring it and continuing to name streets and public buildings in the Hungarian names (Hlahola, 2017).

The CIA documents do not describe the regional leadership very favourably. “The Uzhhorod Communist Party headquarters and Secretariat has premises on the 9th floor of the 100-meter-high building with escalators built by the pre-war Czecho-slovak administration for the Trans-Carpathian legislative assembly. The building is under the guard of the Sluzhba Bezpeky (Security Service) and of members of the Frontier Guard. There is free access to all floors except the 9th floor, for which passes are needed. These are yellow-brown, have

two pages, and a photograph of the holder. Head of the area Communist Party Committee is Stefan Turianica, a chimney-sweep by trade, of a Hungarian nationality, who was prominent at the time of the Hungarian occupation during World War II. Regular meetings of the area Committee take place on Wednesdays and Fridays. The Committee is a gang of unscrupulous adventurers, imposed by dictatorial methods upon the population, whose fate they decide according to orders from Moscow” (CIA-RDP80-00810A000600490008-4).

A lot of information was also collected about the state security agencies. In particular, it is indicated that state security is located not far from the party’s regional committee in a four-storied building. Here is an excerpt from a document about its work: “Outsiders are admitted by the officer on duty on producing a summons. These are not posted but are delivered by messengers of the Security Service headquarters and read briefly: “Report on (date) at (time) at Section so-and-so”: beneath this there is a stamp with the Soviet star and one signature. The Security Service controls all district and local committees and has a wide-spread network of informers., District and local committees have their own Bezpeka (Security – Authors) agents (sometimes the chairman), who in turn employ a number of informers”.

Also, “all letters sent to or received from foreign countries are censored by the Bezpeka; and inland mail, at least most of it is censored by agents or informers employed as clerks at the post offices” (CIA-RDP80-00810A000600490008-4).

The CIA made an attempt to analyse the national and demographic situation in Transcarpathia. In particular, the document notes that “the total pre-World War II population of the Carpathian Ukraine was 750,000. Of the 120,000 Jews included in this number, fewer than 20,000 are still residing in the area. Of 100,000 Hungarians, only about one half are left in the Carpathian oblast. Some 50,000 inhabitants of the area were forcibly resettled in different regions of the USSR. There were no reports on the whereabouts of these people. In spite of these sizable population movements, the population of the Carpathian oblast was estimated at 950,000 to one million in 1950 or considerably more than the pre-war figure. Of the total population, some 600,000 are believed to be ethnically Ukrainians”. The increase in the population in the region was explained by “only a sizable influx of non-Ukrainian elements, presumably from other areas of the USSR and for military service and defense industries, could account for the present population picture” (CIA-RDP80-00809A000600040072-8). As an example, it was cited that “according to rumors” up to 15,000 troops are stationed in Uzhhorod alone. It was assumed that the population data showed an influx of personnel from the armed forces or defense industry workers.

For comparison, here are long-classified documents regarding the population of Transcarpathia, as of November 12, 1945. We are talking about the “brief political and economic characteristics of Transcarpathian Ukraine” prepared by the Central Committee of the Communist Party of Transcarpathian Ukraine and sent to the Central Committee of the CP(b)U. It indicated the population of the region – 800,000 people “mostly the Ukrainians, who in terms of language and customs differ little from the Ukrainians of Dnieper, Galicia and Bukovyna” (CSAPAU, f. 1, d. 23, c. 1902, p. 2). The Soviet statistical collections give the figures of 792,000 in 1947 and 920,200 in 1959. (Narodne, 1969, pp. 11–12; Narodne, 1987, p. 2).

The arrests and repressions of the population carried out by the Soviet authorities in the Transcarpathian region were also pointed out. In particular, it was noted that “all suspicious people are deported to concentration camps in Siberia. Punishments are very strict and the

most severe ones are for violation of guard duties in the frontier zone. Two soldiers were sentenced to 25 years of forced labor in Siberian for not reporting footprints on the ploughed field in the frontier zone”.

The civilian population was also subject to arrests. “Civilians are arrested secretly, primarily during the night, and are taken into custody in small groups. Their relatives hear from them only after three to four months, because such people are usually transported to Siberia. People are asked to voluntarily” accept civilian jobs, primarily in the Donbass, under the promise of higher wages. The others are taken there by force. Some try to escape from the Donbass to the Ukrainians, where they are usually caught by the MVD (Ministry of Internal Affairs – Authors)” (CIA-RDP80-00810A000600490008-4).

Regarding the socio-economic situation in Zakarpattia Oblast, we also have a lot of materials collected by the CIA. The document noted that “in general, consumer goods including clothing and mechanical equipment are more plentiful in the towns (at the cooperative stores) whereas the rural areas are relatively better supplied with agricultural products. The result is a considerable extra-legal barter and outright black market trade between urban and rural areas” (CIA-RDP80-00809A000600040072-8).

This is how an everyday life in the city of Uzhhorod is described in an information report dated April 14, 1953: “90 percent of the adult women are employed, primarily in factories. In the veneer manufacturing plant, “Fanerny-Mebelny Kombinat”, and in the “Lesopilka” (lumber mill) 70 percent of the workers are women. Only foremen, supervisors, etc., are men. Women may get better paid Jobs if they are members of the Komsomol or are wives of prominent Communists. There are frequent irregularities in the payment of wages, because of poor organization. The average earnings of a woman worker is just enough to pay for food and accommodations, and at best for one dress and pair of poor quality footwear a year. One can see them walking in the snow with their toes showing. After seven years of Soviet administration one can still see people wearing clothes bought during the prosperous Czechoslovak era” (CIA-RDP80-00810A000600490008-4).

He also notes the peculiarities of the education of the Soviet youth: “Youngsters on leaving school may choose their trade, but cannot change it later. After six months’ preliminary training they go to factories and remain apprentices (though working practically like grown-up workmen) at average wages of 100 rubles per month, plus full board in government hostels. Every youth has to be in the Pioneers or in the Komsomol, whether they or their parents like it or not. Thus, they are educated in Communism and are taught to be more numbers in a collective” (CIA-RDP80-00810A000600490008-4).

A lot of intelligence materials also concern other aspects of an everyday life in the regions. Thus, food has become synonymous with “standing in line”. “Even so, only the basic foods can be bought. It is an appalling situation for a country almost wholly agricultural, where food used to be plentiful and extremely cheap under the pre-war Czechoslovak administration. The canned food production for the Soviet, Army, such as is produced in the Western Ukraine, is concentrated in Lviv... The most hateful system of exploitation of workers prevails in these factories. Very high norms are fixed and non-fulfillment results in severe punishment of individuals or entire sections whose wages are then reduced for the benefit of the few shockworkers and Party members who work under privileged conditions. This phenomenon – to be observed in all Cominform countries – is a novel type of class warfare within a class. Coffee is unobtainable for an average worker. People have tea only, Georgian and Chinese, sold under various names all of a poor quality. Now there is only



canned fish and crab-meat for the civilian and non-privileged population. There is, however, plenty of vodka” (CIA-RDP80-00810A000600490008-4).

The CIA specialists tried to establish what the standard of living in Zakarpattia Oblast was at that time, comparing it, in particular, with life in other regions of Soviet Ukraine, as well as with the time when the region was part of Czechoslovakia. It was noted that “there was no difference between workmen’s wages in the various towns of the Carpathian Oblast and in the Ukrainian SSR as a whole. A unified system of wages was established throughout the Ukrainian SSR, and probably the entire USSR (except specially designated regions), whereby workers with certain qualifications received the same wages whether they worked in Mukachevo, Uzhhorod, Kyiv, or Odesa” (CIA-RDP82-00046R000200030017-8). During the period of 1949 – 1952, wages remained practically unchanged in Zakarpattia Oblast, but due to the tariff system of wages and the constant increase in labour standards, workers had to constantly increase their efforts, work faster and harder, just to maintain the level of wages.

According to American intelligence, an average salary of an unskilled worker was 450 rubles per month in Zakarpattia Oblast in 1949. The average monthly salary of a skilled worker was 700 rubles. The same salary was in 1952.

Management analysts encountered certain difficulties in assessing the standard of living in Transcarpathia: “It is most difficult to give detailed information on the standard of living in the Carpathian Oblast, because the living standard was so very low, and the purchasing power of workers so minimal. It is practically impossible to say what an average worker considered adequate for his needs; in this respect, the situation in the Carpathian Oblast seemed to be much worse than elsewhere in the USSR. The population of the Carpathian Oblast still had a clear recollection of what the living standard had been prior to 1939, when the Oblast was a part of Czechoslovakia; the standard of living then was approximately 150 % higher than in 1952. In 1939 a worker had to spend 20% of his wages for food; in 1952 he had to spend 80 % and even then he was unable to obtain what he had been accustomed to in 1939. In fact, if one spent 80% of his wages on food in 1952, he would only be living near the subsistence level. To illustrate, one kilogram of meat cost 15–22 rubles, and butter cost 60 rubles per kilogram. A worker was glad if he could buy a piece of meat once a week. It took him several years, living on a subsistence diet to save enough money (800–1,000 rubles) to buy an average quality suit” (CIA-RDP82-00046R000200030017-8).

We can look at the price policy for everyday goods in Mukachevo. In a special table, analysts of the service presented the dynamics of prices for consumer goods in the city during the period of 1948 – 1952 – food, expensive food and drinks, clothes, handmade goods and cars (CIA-RDP82-00046R000200030018-7). It should be noted that the prices of certain goods have partially decreased during the specified years. But on the other hand, the state could not saturate the market with certain categories of goods. See: Table A.

Here are the estimated prices of prepared meals and alcoholic beverages in Mukachevo in 1952 – 1953 in rubles (karbovantsi). As we can see from Table B, the cheapest meals were available in canteens and departmental canteens, followed by the buffet. The most expensive meals were spent in first-class food establishments. The same applied to the prices of alcoholic beverages. Alcohol was not sold at all in canteens, and prices in first-class establishments were 50–100% higher than in buffets.

Table A

**Prices (in rubles) for Consumer Goods in Mukachevo, Transcarpathian Oblast  
(CIA-RDP82-00046R000200030018-7)**

| <b>FOODSTUFFS</b>         | <b>1948</b>   |             | <b>1950</b>  |             | <b>June 1952</b> |             |
|---------------------------|---------------|-------------|--------------|-------------|------------------|-------------|
|                           | <b>Govt.</b>  | <b>Free</b> | <b>Govt.</b> | <b>Free</b> | <b>Govt.</b>     | <b>Free</b> |
| Black bread, kg.          | 2.5           | 2.7         | 2.2          | 2.4         | 1.7              | 1.8         |
| White bread, kg           | 3.5           | 3.8         | 3            | 3.2         | 2.5              | 2.7         |
| Milk; l.                  |               | 4-5         |              | 3.2         |                  | 2.5         |
| Eggs, dozen               |               | 20          |              | 15          |                  | 12          |
| Butter, kg.               | 100*          | 120         | 80*          | 100         | 60*              | 80          |
| Vegetable oil, l.         |               | 40          |              | 25          |                  | 20          |
| Cheese, kg.               |               | 70          |              | 50          | 30               | 40          |
| Sugar, kg.                | 15*           | 30          | 13*          | 20-25       | 11.5             |             |
| Beef, 2nd choice, kg.     | 30            | 28          | 20           |             | 16               | 14-15       |
| Pork, 1st grade; kg.      | 35            |             | 25           |             | 20-22            |             |
| Veal, 1st grade, kg.      | 32            |             | 22-23        |             | 18-20            |             |
| Chicken, dressed, kg.     | 40            |             | 30           |             | 25               |             |
| Fresh salmon or carp, kg. | 20            |             | 16           |             | 12-14            |             |
| Potatoes, kg.             | 1.2           | 1.8         | 1.0          | 1.4         | 0.9              | 1.2         |
| Rice; kg.                 |               | 50*         |              | 40*         |                  | 30*         |
| White beans, kg.          |               | 7           |              | 6           |                  | 5           |
| Apples, kg.               |               | 1.5         |              | 1.2         |                  | 1           |
| Oranges                   | Not available |             |              |             |                  |             |
| Salt, kg.                 | 0.5           |             | 0.4          |             | 0.3              |             |

\* *Seldom Available*

Table B

**Approximate Prices (in rubles) of Meals and Liquor (1950 – 1952)  
in Mukachevo (CIA-RDP82-00046R006200030019-6)**

| <b>TYPE</b>  | <b>First Bar</b> | <b>Snack Bar</b> | <b>Factory or Enterprise Mess</b> |
|--|------------------|------------------|-----------------------------------|
| Breakfast: two eggs, butter, bread tea   | 5-6              | 4                |                                   |
| Dinner:<br>Soup, the second course meat or fish with potatoes and one vegetable, dessert | 12-15            | 8-10             | 5                                 |
| Supper:<br>Meat course with potatoes and one vegetable, dessert                          | 10-12            | 6-8              | 4-4.5                             |
| 150 gram of vodka  | 3.5              | 2.7-3            |                                   |
| Bottle of beer (500 rp.)   | 4                | 2.8-3            |                                   |
| Bottle of cheap wine (750 rp.)   | 15-18            | 10-12            |                                   |

The reports noted that the standard of living in Carpathian Ukraine rapidly deteriorated. "Since the summer of 1951 people stood in line for everything. Those who want to get food in the morning have to line up in queues at 01.00 hours. Shops open at 07.00 hours. People

call these lines “oched” (the Russian word for bread-lines). Vegetables disappeared in the shops and at markets; rationed margarine could be bought once or twice a month, but since last summer it has almost disappeared. The only relatively cheap product is alcohol. Moscow vodka costs 15 rubles per liter, various other types of brandy cost 45 – 56 rubles. A pack of 20 cigarettes costs from 1.45 to 5 rubles. They are often raw and moldy. A pair of leather shoes made by the “Svit” plant in Gotwaldov (Zlin), Czechoslovakia, without coupons cost 400–420 rubles. Cheaper are the Soviet-made shoes (only 350–400 rubles), and the cheapest – Kyiv and Uzhhorod. In the summer of 1951 cheap shoes were sold at the market. They cost about 100 rubles. Woolen materials cost 360 to 450 rubles per meter. These are sold once a month. All textiles are imported from Czechoslovakia, Hungary, and Poland. One has to pay 220 rubles for having them made into a suit. Motor vehicles are rare in Uzhhorod now. Only the state enterprises and police have trucks and there are only two passenger cars left in the entire city. The rent for a city apartment, belonging to communal enterprises, consisting usually of only one room, runs from 30 to 40 rubles. The rent for the so-called civilian apartment is 150 to 200 rubles” (CIA-RDP80-00810A000600490008-4).

Information about everyday items is also provided. For example, according to American intelligence, “Plain, German steel watches, available only at the black market, cost 500 rubles. German gold watches cost 1,200 rubles. Cameras are rarely seen and those imported from East Germany, marked “FET” (sic), cost 1,600 rubles. The Soviet-made primitive box-cameras cost 60 rubles (in Germany 10 DM) of an extremely poor quality Soviet film. Kitchen utensils, in a limited variety and poor quality, are sold at the Univermah. A plant called Dynamo sells bicycles and sporting goods. The cheapest bicycle, without accessories, costs 750 rubles and the so-called racing bicycle costs from 1,200 to 1,300 rubles. A single-barrel small-bore gun costs 280 rubles and a double-barrel shotgun costs 800 rubles” (CIA-RDP80-00810A000600490008-4).

And this is the way entertainment and leisure in Zakarpattia region are described: “Former coffee shops have now become teahouses, where you can buy non-meat dishes for two or three rubles and fish. There are only two cinemas in Uzhhorod, “Omnia” and “Moscow”. Now and then an old Hollywood movie is still on, such as Tarzan or Rose Marie, and then the cinema house is packed. Otherwise, only the Soviet films are on in half-empty cinema houses. Films must be approved by the local Censor Committee of the Communist Party. Workers are entitled to 14 days of holiday per year, which they do not have to take and can receive cash compensation in return. Recreation centres in the Carpathians are reserved for approximately five percent of beneficiaries. So far, not a single Carpatho-Ukrainian worker went to any of the famous Soviet recreation centres in the Crimea or the Caucasus” (CIA-RDP80-00810A000600490008-4).

The Communist Party leadership paid more attention to urban broadcasting, through which intensified campaigning and propaganda of the Soviet system was carried out. “Town broadcasting is transmitted through public loudspeakers, bellowing from dawn to dusk. Anti-American slogans are repeated in Russian, Ruthenian, and Hungarian. People prefer to listen to the Voice of America, BBC, and broadcasts from Paris”, – the CIA report says (CIA-RDP80-00810A000600490008-4).

And this is how American intelligence saw the situation in medical care in Zakarpattia region: Uzhhorod hospital is overcrowded; people lie on mattresses spread on the floor and, if more seriously ill patients are brought to the hospital, those who suffer from minor diseases are simply thrown out. This hospital has only three experienced doctors, while a number

of Russian physicians have no experience and literally learn on the patients. More serious operations are done by local doctors, less serious ones by the Russians, who are considered to be stupid and primitive. Mortality rates even among the less seriously ill are high” (CIA-RDP80-00810A000600490008-4). In general, the set of documents analysed in the article is informative enough to fulfill the research objectives.

**The Conclusions.** The CIA documents analysed in the article contain really important information that, unlike many other historical sources, is not burdened with excessive subjectivism in the assessment of events and historical figures, but is primarily of a practical nature in the context of the strategic confrontation between the USA and the USSR on the international stage arena during the post-war period. Not all aspects of a daily life in Transcarpathia in the second half of the 1940s and early 1950s are fully revealed in these documents (it is unlikely that such a task was set before the CIA specialists), but they reflect significant layers of the region’s history both in a panoramic, spatial and temporary vision, as well as in a concrete and historical section (relevant information often is of a retrospective character); the detailing of certain aspects description of the population’s life in the region is sometimes at a very high level.

Despite the fact that the USSR was a strategic adversary of the USA during the Cold War, the information of the CIA specialists regarding the life of the population of Transcarpathia as a part of it is not one-sided in the framework of a possible “two-colour” assessment (“black and white”). In a number of relevant documents, sympathy for the population of the region is palpable, the rather difficult conditions of its economic, political and cultural life during the first post-war years, a strict management style of the state and party leadership of Transcarpathia, a significant role of power structures, etc. are emphasized. It is also important to recognize the Ukrainianness of the population of Transcarpathia, despite the presence of “mental” and “cultural” barriers between local residents and visitors, including those from the eastern regions of Ukraine.

The outlined issue deserves its further thorough study. First of all, the focus is on the issues of synthetic assessments of the history of the region, potentially available in the CIA documents of the Cold War era, as well as their correspondence to reality (regarding individual assessments or facts contained in them, additional in-depth research is needed to clarify and verify them), comparison of their information with data available in the documents of other special services of the world (the USA, the UK, the USSR, etc.), the specifics of the activities of individual historical figures whose lives were connected with Transcarpathia at that time, etc.

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**YAROSLAV FEDORUK'S SCIENTIFIC AND ADMINISTRATIVE ACTIVITIES  
UNDER THE CONDITIONS OF THE CRISIS OF THE SOVIET SYSTEM  
(1960 – 1980s)**

**Abstract.** *The purpose of the research is to analyse the formation of Yaroslav Fedorchuk as the Soviet public and political figure with a projection to the present, clarification of diverse aspects of his participation in the industrial development of the Carpathian region, highlighting the contribution to the economic concept formation “the more economy is strengthened – the better is for the welfare growth of people”. The methodology of the research is based on the principles of historicism, objectivity, and systematicity. The following methods have been used: general scientific (analysis and synthesis, abstraction) and specifically scientific (critical, biographical and prosopographic). The scientific novelty consists in the fact that in 1972, in his studies a young scholar and practitioner Ya. Fedorchuk focused on the issues of improving the economy centralized management in order to boost a social welfare of population. In his candidate's thesis under the title “Effectiveness of New Technology*

under NTR Conditions” the scholar questioned the basis of the centralized planning – the development rate of production means (group A) should be higher than the development rate of consumption means (group B). **The Conclusion.** Taking into account the specifics of the western region of the Ukrainian SSR, the union and republican leadership focused on the strengthening of ideological and political work among population, the fight against “bourgeois nationalism”, “religious remnants”. However, the citizens’ position – whether to soften or increase the pressure – directly depended on the leaders of a lower and middle (regional) level of management. All spheres of the socio-political and socio-economic life were permeated by excessive ideologization and total control. The policy of Moscow leadership in Ukraine did not achieve the desired results, both due to a passive and active resistance of the population as a whole, and due to the balanced policy of the individual party-Soviet leaders on the ground. The Ukrainian people managed to preserve the eternal spiritual values under the difficult conditions of totalitarianism owing to the ascetic work of the intelligentsia, whose bright representative was the intellectual and pragmatist Yaroslav Petrovych Fedorchuk. He did no less than those, who started an open struggle against the totalitarian system. The local population got jobs, received free housing, social guarantees, there were built schools, kindergartens, recreation camps, sanatoriums, preventive clinics, rural hospitals, and midwifery centres in the second half of the 20th century.

**Key words:** the Soviet power, Yaroslav Fedorchuk, personality, welfare, medicine, education, culture.

### НАУКОВА І АДМІНІСТРАТИВНА ДІЯЛЬНІСТЬ ЯРОСЛАВА ФЕДОРУКА В УМОВАХ КРИЗИ РАДЯНСЬКОЇ СИСТЕМИ (1960 – 1980-ті рр.)

**Анотація.** *Мета дослідження* – становлення Ярослава Федорчука як радянського громадсько-політичного діяча з проєкцією на сьогодення, з’ясування різних аспектів його участі в індустріальній розбудові Прикарпаття, висвітлення вкладу у формування економічної концепції “зміцнюється економіка – зростає добробут народу”. **Методологія дослідження** ґрунтується на принципах історизму, об’єктивності, системності. При проведенні дослідження застосовувались загальнонаукові (аналіз і синтез, абстрагування) та конкретно-наукові (критичний, біографічний та просопографічний) методи. **Наукова новизна** полягає у тому, що в 1972 р. молодий науковець-практик Я. Федорчук у своїх розвідках акцентував увагу на питаннях удосконалення централізованого управління економікою з метою поліпшення соціального добробуту населення. У кандидатській дисертації “Ефективність нової техніки в умовах НТР” він поставив під сумнів основу централізованого планування – темпи розвитку засобів виробництва (група А) повинні бути вищими від темпів розвитку засобів споживання (група Б). **Висновки.** Зважаючи на специфіку західного регіону Української РСР, союзне і республіканське керівництво звертало особливу увагу на посилення ідейно-політичної роботи серед населення, боротьбу з “буржуазним націоналізмом”, “релігійними пережитками”. Однак від громадянської позиції – пом’якшити чи посилити тиск – безпосередньо залежало від керівників низової та середньої (обласної) ланки управління. Усі сфери суспільно-політичного та соціально-економічного життя були пронизані надмірною заідеологізованістю і тотальним контролем. Політика московського керівництва в Україні не досягла бажаних результатів – як через пасивний і активний спротив населення загалом, так і завдяки виваженій політиці окремих партійно-радянських керівників на місцях. Український народ у нелегих умовах тоталітаризму зумів зберегти одвічні духовні цінності завдяки подвижницькій роботі інтелігенції, яскравим представником якої виступає інтелектуал-прагматик Ярослав Петрович Федорчук. Він зробив не менше за тих, котрі пішли на відкрити боротьбу з тоталітарною системою. У другій половині ХХ ст. місцеве населення одержувало роботу, безплатне житло, соціальні гарантії, будувалися школи, дитячі садки, табори відпочинку, санаторії, профілакторії, сільські лікарні, фельдшерсько-акушерські пункти.

**Ключові слова:** радянська влада, Ярослав Федорчук, особистість, добробут, медицина, освіта, культура.

**The Problem Statement.** The historical (life) material – the biography of the Komsomol member, and therefore a party worker – is almost unfamiliar, unknown, condemned or simply

stamped for the generation born during the independence of Ukraine. It is not an abstract representative of the Soviet community (a party functionary), but it is a rather expressive, colourful Volynian with his own unique mentality, a unique view of social and political processes.

Under the conditions of the monopoly rule of the CPSU and its ideology, the Soviet scholars had to rely only on Marxist-Leninist materialist dialectics and party dogmas. It was undoubtedly believed that Marxism-Leninism absorbed all achievements of a human genius – “the verity”. The scientific researches were done by the creation of various myths (“scientific fictions”) quite often in order to reinforce the ideological postulates. However, as Ya. Fedorchuk proved in his works – “economic laws are not dogma, but a trend that makes its way” or “the decisions of the Central Committee of the CPSU were influenced by the pressure of local City Committees, District Committees, party organizations” (Fedorchuk, 1982, p. 123). The First Secretary of Dolyna District Party Committee of Ivano-Frankivsk region of that time wrote in the article “The Interests of Districts and Departments”, which was published in the Central Committee body of the CPSU “The Social Industry” on July 3, 1983 the following: “There can be only one conclusion. Local bodies should have a real opportunity to influence the ministries of enterprises in their territory in matters of capital investments redistribution, social structure formation of the national economy”. Innovative ideas of that time were set forth in the monograph under the title: “Effectiveness of Technology: Reserves, New Growth Trends” by V. Liebiediev, V. Poltaryhin, and Ya. Fedorchuk in 1972. There were brought in new approaches to the socialist economy development for discussion even before Ya. Fedorchuk’s candidate thesis defense in Moscow.

Scholars should pay special tribute to the practitioner and scholar, Yaroslav Fedorchuk (born in 1936 in the village of Nesvych, Lutsk poviat, Volyn Voivodeship to a peasant family with many children), whose fate witnessed tragic and bloody events in Volyn during World War II. He was a prisoner of the German captivity, a worthy representative of the generation called the “children of war”. Yaroslav Petrovych’s life path was in many ways typical of an intellectual of his generation: went to a village school, studied at the university, worked at a plant, dealt with social and scientific activities. At the same time, his life path had numerous peculiarities. Yaroslav started his career as a teenager working on a collective farm, later – as a full-time worker. He graduated from Lviv Polytechnic Institute with honour, postgraduate studies at the Academy of Social Sciences in Moscow. Dozens of industrial, social and household objects, and the construction of cotton spinning and sewing factories in the town of Dolyna are included into his projects. Ya. Fedorovych was candidate of economic sciences, the author of numerous monographs and more than 60 scientific papers. He was the Deputy of the Verkhovna Rada of Ukraine of IV–VII convocations, one of the founders of the All-Ukrainian Association “Batkivshchyna”.

**The Analysis of Recent Research and Publications.** At first glance it seems that the issue historiography is covered in scientific papers – the socio-economic processes in the Ukrainian SSR in the second half of the 20th century. But there are no special studies on the regional leadership representatives’ activities of the time in the political system of the Ukrainian SSR. The above-mentioned issue was partially covered in the works, written by O. Maliarchuk, V. Ostapiak (Maliarchuk, 2008; Maliarchuk, 2020; Maliarchuk, 2023; Maliarchuk, Ostapiak, 2022), V. Marchuk and V. Maksymets (Marchuk & Maksymets, 2022). In the above-mentioned works Ya. Fedorchuk was noted as one of the party leaders of the time, who initiated specific tasks of the industrial development of the western Ukrainian towns of Dolyna and Ivano-Frankivsk. Professor V. Serhiichuk gave a description of Ya. Fedorchuk



in the article under the title “Not Losing the Ukrainian Soul” (Serhiichuk, 2011). In the archive, he found a document in which Ya. Fedorchuk appealed to V. Shcherbytsky regarding the return of special settlers, as a result of which the official Commission was created. V. Sabadukha and V. Kosylo carried out a historiosophical analysis of the Soviet officials’ activities (Sabadukha, 2023; Sabadukha & Kosylo, 2022).

In the article “A Person is his Actions” the researcher I. Havrylovych wrote about Ya. Fedorchuk’s bureaucratic work: “New schools and kindergartens, ... and new maternity hospital, regional clinical hospital in “Pasichna” street, another building of the current Central Medical Centre in St. Mazepy street, the regional children’s clinical hospital were constructed. New buildings of Institutes of the time were launched into use – pedagogical, medical, oil and gas, as well as the municipal centre of culture and leisure, a central indoor market, water infrastructure system and sewage. The dams appeared along the shores of the Bystrytsia Solotvynska, and nowadays there are no floods any longer, as there were floods in 1969 and V. Stefanyk Embankment and other riverside streets were flooded. The first trolleybus was launched, and a pedestrian zone was built in the centre of the city – “stometrivka”. Ivano-Frankivsk was among the top three cities in Ukraine in terms of a public improvement level for several years” (Havrylovych, 2021). Ya. Fedorchuk’s memoirs, scientific and journalistic works became the sourcebase of our research primarily (Fedorchuk, 1972; Fedorchuk, 1982; Fedorchuk, 1983; Fedorchuk, 2007; Fedorchuk, 2011; Fedorchuk, 2012).

**The purpose** of the research is to analyse the formation of Yaroslav Fedorchuk as the Soviet public and political figure with a projection to the present, clarification of diverse aspects of his participation in the industrial development of the Carpathian region, highlighting the contribution to the economic concept formation “the more economy is strengthened – the better is for people’s welfare growth”.

**The Results of the Research.** Ya. Fedorchuk’s activity, who was the resident of Volyn, was connected with Ivano-Frankivsk region for more than a quarter of a century. In 1957, he was sent to work at Bolekhiv drilling plant, as a young mechanical engineer after graduating from Lviv Polytechnic. He worked for some time as a motorist’s assistant due to the lack of vacant positions. In a short time, he was transferred to the position of a foreman in the town of Dolyna. The versatility of his talents was manifested in the oil fields of Prykarpattia. Consequently, he became the chief mechanic of the tower assembly office in Nadvirna. Ya. Fedorchuk got acquainted with the Secretary of the District Committee of the Komsomol when he was completing his “party task” – the construction of a diving tower on the bank of the town lake in Nadvirna. The Komsomol leader invited Ya. Fedorchuk to receive the regional Komsomol committee reward “for active work in the sphere of the communist education of the youth”. He was elected a member of the Bureau and not on the staff Secretary of Nadvirna District Committee of the Komsomol a few months later at the Komsomol conference to the surprise of the awardee.

During the “Khrushchov Thaw” the Central Committee of the CPSU demanded the nomination of local youth workers, especially production workers, in the western regions of Ukraine. There were not so many candidates in Halychyna. Due to various circumstances, the biography of young specialists, who came from the western regions, but at the same time were not local, but from other western regions, was the best choice. At the same time, the Head of Nadvirna branch of the KGB suggested that Ya. Fedorchuk should work in the KGB. Ya. Fedorchuk, who was the Komsomol engineer, refused to serve work in the KGB.

It should be mentioned that not all engineers were suggested working in the above mentioned body. Those candidates, who had organizational skills, knew production, and

gained authority were chosen. In turn, the enterprise party organizer (parttorh) suggested him “joining the ranks of the CPSU” as it was customary to say at the time. There was no prospect of growth, nor the realization of plans – “to come to power” and work for the benefit of ordinary Ukrainians without the party membership card at that time. Owing to his erudition, organizational skills and experience, Ya. Fedorchuk managed to become the Komsomol youth leader in Ivano-Frankivsk region quickly.

Ya. Fedorchuk was a postgraduate student at the Academy of Social Sciences of the Central Committee of the CPSU and tried to use the acquired knowledge by conducting an economic analysis of industry and scientific and technical potential of Ivano-Frankivsk region. He was one of the first, who drew attention to the fact that direct contracts of scientific institutions with enterprises that were interested in solving certain issues of production had a special place in increasing research works efficiency. It was natural that he was for the new technology of drilling wells to a depth of 7,000 meters and artificial impact on the layer for additional oil production. Hence, the amount of research work increased from 160,000 to 446,000 karbovantsi, or 2.8 times at Ivano-Frankivsk Institute of Oil and Gas from 1965 to 1969 (SAIFR, f. P-1, d. 1, c. 3583, p. 92). Ya. Fedorchuk, a postgraduate student noted significant shortcomings in the work of the Institute and “Ukrzakhidnaftahaz” association. He came to the conclusion that scientific and research work on effectiveness of geological exploration and exploitation of the productive horizons in Prykarpattia was conducted poorly. The Institute allowed the dispersion of scientific forces and funds (90 issues were developed at the same time). Therefore, it is not surprising that only 20 kopiks were returned for every karbovanets spent on the research work (CSAHAAU, f. 1, d. 79, c. 1927, p. 3).

The specialty – political economy and the foundations of scientific management of the economy correspond the best to his knowledge and future opportunities. A young postgraduate student Ya. Fedorchuk approached the economic analysis in a somewhat new way and took an active part in meetings and symposia, making reports and delivering speeches. At the end of the first year, he was elected the head of scientific and practical seminar on the development of scientific and technical progress. There were also discussed the issues related to improvement of the management theory of the national economic complex of the country along with the study of fundamental foundations of economic science at the lectures and practical classes. It was done sincerely with the conviction that socialism was a more progressive socio-economic formation than capitalism. Postgraduate students, who had some practical experience, including industrial experience, accepted this with a glimmer of hope concerning the state of affairs improvement.

Ya. Fedorchuk, a postgraduate student drew attention to the drastic need for further improvement of the state system of economic management owing to his personal practical experience and acquired theoretical knowledge. Discarded private property, personal interest, and initiative hampered the social development. The above-mentioned was the main incentive for a young scientist to look for new theoretical developments.

The doctrine of Marxism-Leninism proclaimed that the growth of social production labour productivity in a simplified version had the following form: the share of embodied labour in a unit of production increases, the share of living labour decreases with a general decrease in their sum. A post-graduate student, Ya. Fedorchuk based on the example of the US economy for the period from 1950 to 1970 proved that the above-mentioned law did not work. On the contrary, the share of living labour increased with a fairly rapid increase in the labour productivity of social production in this country. Both the Soviet economic

science masters as well as young scholars from Moscow were particularly interested in the above-mentioned conclusion. At that time discussions and exchange of opinions on certain issues were more democratic and free in the capital, in contrast to Kyiv. However, there was no general criticism in public, let alone the failure of the socialist system. There were about one hundred and fifty guests, who gathered for the defense of the thesis. The main Soviet economist, Academician Tigran Serhiyovych Khachaturov also came. He was interested in the issue of the capital investments efficiency coefficient, which was interpreted in a new way in the thesis. The interpretation of Ya. Fedorchuk differed to a large extent from the corresponding methodology adopted in the USSR, the author of which was a renowned scholar, economist T. S. Khachaturov (Fedorchuk, 2011, p. 80).

On Ya. Fedorovych's shoulders, there was the burden of the political expediency, which was menacing his scientific conclusions, thesis, and a further fate once again. Russia's imperial ambition for world domination rested on the tact of the Academy teaching staff. It was a completely different world of a human relationship, in which one could develop one's intellect and deepen scientific knowledge. Furthermore, T. S. Khachaturov admitted that the share of labour may decrease, albeit as a "temporary trend". It was a great merit of a young scholar (Fedorchuk, 2011, p. 81).

Ya. Fedorchuk posed one of the key issues of increasing welfare of population in his candidate's thesis "Effectiveness of New Technology under the Conditions of NTR". Even before the defense of the thesis in Moscow, new approaches to the economy development were presented for discussion by scholars. The dominant trend was the reduction of labour in a unit of social production under the conditions of the scientific and technical revolution and, on the contrary, there was an increase in the share of live labour, which contradicted the established scientific and practical dogmas adopted in the USSR at the time and had influence on the revision in central planning of the relationship between the production of the means of production and the means of consumption. In the end, it was about improving welfare of people (Fedorchuk, 1972).

A few years later, the Central Committee of the ALYCL approved the work experience of Ivano-Frankivsk Komsomol Regional Committee, which discussed the development of the folk customs, culture, language, and, separately, the improvement of living conditions for young professionals. On this occasion, an almost hour-long programme was organized on Channel 1 of the central television. Ya. Fedorchuk and the intelligentsia representatives of the village of Rozhniv, Kosiv district took part in it. Writers, school principals, employees of cultural institutions, and the First Secretary of the Party Regional Committee participated in the work of the Komsomol Regional Committee Plenum that discussed the above-mentioned issue. The Ukrainian writer, Iryna Vilde, who was included in UNESCO's list of famous people of the 20<sup>th</sup> century, came from Lviv on this occasion. In her speech, she gave high praise to the work of the Regional Komsomol Committee, personally to Ya. Fedorchuk for raising the culture of the village, developing folk traditions (Fedorchuk, 2011). Ya. Fedorchuk managed to legalize the work on development and preservation of folk traditions and everyday culture of the Carpathian villages, which were forgotten and destroyed on purpose by the totalitarian system owing to the Central Committee of the Communist Party of Ukraine. It were friends from Kyiv, employees of the Central Committee of the Komsomol of Ukraine, who introduced Ya. Fedorchuk to the work of Vasyl Symonenko, Les Kurbas, Yevhen Pluzhnyk, and Vasyl Stus.

The romance cultivated by the Komsomol embellished everyday life, working man, helped to overcome obstacles in the times of "advanced socialism" and "youthful maximalism". What Ya. Fedorchuk sought for was fulfilled – the Central Committee of the ALYCL, in agreement

with the Central Committee of the CPSU, decided on the construction of Kalush Chemical and Metallurgical Combine and declared it an All-Union Komsomol building. They began to work on organizing the Komsomol headquarters, Komsomol youth brigades, ensuring appropriate working and living conditions for young people. They went to the construction of Sievierodonetsk Chemical Complex in order to gain experience of working with a group of young specialists. Ya. Fedorchuk came to the conclusion there that the enterprise in Kalush was not worse than in Severodonetsk. But more attention was paid to the youth by the party and leaders in Sievierodonetsk. The main thing was that the Komsomol organizations were more open, proactive, as they said at that time – combative. The problem could only be partially solved in Ivano-Frankivsk region. Everything was “under control” in Ivano-Frankivsk region, as in all western regions of the Ukrainian SSR. Criticism of shortcomings was prohibited. It was considered, both by the party and the KGB bodies, as criticism of the Soviet government, manifestation of localism, which was immediately regarded as a hidden manifestation of the nationalism with the corresponding “conclusions” (Fedorchuk, 2011).

At the end of the 70s, two KGB officers from Moscow and Kyiv entered the office of Ya. Fedorchuk, the First Secretary of Dolyna District Committee of the party. After greetings, they began to report that “an anti-state enemy organization was discovered in the area. It included seventeen people. In particular, one party member and three candidates. Mainly, they were the residents of Solukovo and Trostianets. The group was headed by the former convict Krainyk”. It was about the dismissal of the head of the KGB district branch, V. Kushchenko, from the security services. In the resolution there was also discussed the motivation for this dismissal: “For serious misconduct in work, which led to systematic manifestations of the Ukrainian bourgeois nationalism in Dolyna district”. The Kadebists, “exposed” such a large nationalist organization and wanted to report to the Central Committee of the Communist Party of Ukraine and, together with it, to the higher party body, and start prevention. A major political action was being prepared, which would not have been complete without the arrests and imprisonment of the best Ukrainians. In the resolution of the Central Committee of the CPSU on political work among population of Lviv region there was focus on the struggle against the Ukrainian Nationalist Movement. In spite of this, there appeared a letter written by the poet Vasyl Stus to P. Shelest, the First Secretary of the Central Committee of the Communist Party of Ukraine already after the resolution. The Secretary of Dolyna district Committee of the party also knew about Petro Shelest’s book: “My Soviet Ukraine”, Ivan Dziuba’s work: “Internationalism or Russification”, a note from the Secretary of the Central Committee of the Communist Party of Ukraine V. Malanchuk with the offers for strengthening the fight against the national communism, and about information addressed to the Central Committee of the CPSU V. Shcherbytsky about ideological work. He was jubilant regarding the national movement, which was not destroyed by any repression and persecution, and highly appreciated the courage of many Ukrainians. And he took their side – to save his Dolyna residents from prison and thereby slow down, at least to some extent, the repressive flywheel that was gaining momentum again. There was nowhere to retreat. It was about the destruction of the nation’s spiritual, cultural, historical and, ultimately, language heritage. Later, two “high ranks” from the KGB visited Ya. Fedorchuk’s office again. They stated that the KGB authorities followed his recommendations and not to qualify Krainyk’s actions and his subordinates as a nationalist group (Fedorchuk, 2011).

The First Secretary of Dolyna District Committee of the party kept in mind one, but very important V. Kushchenko’s act. The underground priest of the GCC Ya. Lesiv came to meet

him. The underground priest had been already imprisoned for his activities and was under the open supervision of the police officers and the Kadebists. He lived in one of the villages of the district, sixteen kilometers from Bolekhiv. He had to go to Bolekhiv every week and report that he was there by signing in the corresponding register. The underground priest asked that he could perform this procedure on the spot, in the rural council of the village where he lived temporarily. Winter raged, there was snowstorm and the way to the town was not easy. Ya. Fedorchuk asked V. Kushchenko for Ya. Lesiv not to go to Bolekhiv to register there.

It was a brave and humane act. There was the KGB branch with a staff of six to eight employees in each district of the western regions of Ukraine. The effectiveness of their work was assessed by the number of detected enemy elements, their transfer to court, prevention, and agency recruitment. The special service, despite the official ban after the relevant Khrushchov decision, still followed the party and the Soviet workers.

The Ukrainian SSR provided almost the fifth part of the national income of the USSR, more than a quarter of coal production, the third part of steel and rolled steel, and a significant part of agricultural products. The knowledgeable scholar, practitioner Ya. Fedorchuk summed up that “the contradictions in the political system could be used to advantage and build up the socio-economic system. It was necessary to build schools, hospitals, and shops in order to develop the region normally. I always had to enter into a conflict with the higher management, which did not want to work in this direction. An annoying phrase was heard: “What for do you need it?”. I was taking a risk. I had my own initiatives. This development was aimed at the progress of Prykarpattia. At that time, the western region of Ukraine developed at a high rate. Few people looked at the directives of the five-year plan. You had to work and put your heart into it, and not think about any personal benefits, and the results were positive” (Maliarchuk, 2023, p. 82).

The content of social policy in the USSR and Ukrainian SSR did not change during the period under analysis. It was based on distributive relations and centralized administrative management. The growth of the economic potential of the country and the republic made it possible to focus on the social problems, which contributed to improvement of welfare and rural life (Fedorchuk, 1989). However, it depended on the initiative to a decisive extent and attitude to the performance of their official duties on the part of the local Party-Soviet and economic apparatus – to promote welfare, medicine, education, and culture of people formally or truly.

Therefore, the interest of the nation is the only and absolute basis that gives the right to political activity and public service, and criterion of public, political and state fruitfulness of an activist should be the results of previous socially useful work. A person, who is able to act from the standpoint of the national interests, is a constitutive component of the personalism ideology. This ideology has every reason to be adopted positively by both scholars and masses, because, first of all, it does not deny the idea of humanism, second of all, it does not contradict the Christian idea of the individual, who strives for self-improvement and environment, third of all, it opens the way to those, who are able to act in the interests of states and society, and vice versa, closes the perspective to those, who use the state and power as a means of enrichment (Sabadukha, 2023, p. 22).

**The Conclusion.** Taking into account the specifics of the western region of the Ukrainian SSR, the union and republican leadership focused on the strengthening of ideological and political work among population, the fight against “bourgeois nationalism”, “religious remnants”. However, the citizens’ position – whether to soften or increase the pressure –



directly depended on the leaders of a lower and middle (regional) level of management. All spheres of the socio-political and socio-economic life were permeated by excessive ideologization and total control. The policy of Moscow leadership in Ukraine did not achieve the desired results, both due to a passive and active resistance of the population as a whole, and due to the balanced policy of the individual party-Soviet leaders on the ground. The Ukrainian people managed to preserve the eternal spiritual values under the difficult conditions of totalitarianism owing to the ascetic work of the intelligentsia, whose bright representative was the intellectual and pragmatist Yaroslav Petrovych Fedorchuk. He did no less than those, who started an open struggle against the totalitarian system. The local population got jobs, received free housing, social guarantees, there were built schools, kindergartens, recreation camps, sanatoriums, preventive clinics, rural hospitals, and midwifery centres in the second half of the 20th century.

**The Prospects for Further Research.** It is important to do the research on the activities of the First Secretary of Tysmenytsky District Committee of the Communist Party of Ivano-Frankivsk region, Ihor Andrukhiv (04.01.1957 – 11.12.2011), who in the fall of 1988 was one of the first to join the ranks of Ivano-Frankivsk Regional Cultural and Scientific Society “Rukh” (Movement) (Malyi Rukh) and his researches initiated the study of the Ukrainian Liberation Movement of the first half of the 20th century.

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**“THE UKRAINIAN HERALD” – A JOURNAL OF THE UKRAINIAN  
RESISTANCE (1970 – 1972)**

**Abstract.** *The purpose of the article is to do the research on the self-published underground journal “The Ukrainian Herald” as a factor and component of the struggle of the Ukrainian national movement in the 1970s and the 1980s. The methodological basis of the research was concrete historical, comparative historical and analytical methods. The principles of objectivity, historicism, multi-factoriality have been used. The scientific novelty: the reasons for creating the journal, the peculiarities of the formation of the editorial team, the conditions for preparing and publishing the journal have been studied, as well as the programme objectives and content of “The Ukrainian Herald” have been analyzed. The Conclusion. In the course of the conducted research, it has been determined that under the conditions of a total control and persecution by the Soviet special services, Viacheslav Chornovil managed to create and publish an underground self-published journal. At all stages of the publication of the journal, he followed a strict conspiracy: starting from the collection of information, processing of editorial materials, publishing of the “signal copy”, reproduction and distribution. The meticulous means of the conspiracy allowed him to publish the journal for a relatively long period of time under the existing socio-political circumstances. The danger of exposing the publishers of the journal forced V. Chornovil to select a limited number of assistants carefully. The optimally created organizational structure of “The Ukrainian Herald” nevertheless counted a significant number of people. In the 1960 s and 1970 s no other underground editorial offices of the Ukrainian publications had such a number of functional employees. The members of the publishing team effectively performed their tasks, and during the arrests and interrogations, they did not reveal their or V. Chornovil’s involvement in the production of the journal.*

*Viacheslav Chornovil successfully organized the distribution channels of the journal. In particular, he established the illegal transportation of “The Ukrainian Herald” across the Soviet border to the West. Due to the fact that the journal was reprinted abroad in large numbers, the readership of “The Ukrainian Herald” “Herald” grew greatly. Its materials objectively, thoroughly and relatively quickly provided the public both in the middle of the country and outside the country with information about the activities of freedom fighters and the repressions of the authorities. “The Ukrainian Herald” turned into an extremely effective tool for the Ukrainian national movement’s information war with the Soviet regime.*

**Key words:** “The Ukrainian Herald”, V. Chornovil, journal, self-published, national movement.

**“УКРАЇНСЬКИЙ ВІСНИК” – ЧАСОПИС УКРАЇНСЬКОГО СПРОТИВУ  
(1970 – 1972)**

**Анотація.** *Метою статті є дослідження самвидавчого підпільного журналу “Український вісник” як чинника та складової боротьби українського національного руху на початку 1970-х рр. **Методологічною основою дослідження** послужив конкретно-історичний, порівняльний та історико-аналітичний методи. Використано принципи об’єктивності, історизму, багатофакторності. **Наукова новизна:** вивчено причини створення журналу, особливості формування видавничого колективу, умови здійснення підготовки, друку та змісту журналу. **Висновки.** У ході проведеного дослідження встановлено, що в умовах тотального контролю та переслідування з боку радянських спецслужб В’ячеславу Чорноволу вдалося створити і видавати підпільний самвидавний журнал. На усіх етапах видання часопису він дотримувався суворої конспірації: починаючи від збору інформації, опрацювання редакційних матеріалів, друкування “сигнального примірника” та тиражування й оприлюднення. Надретельні засоби конспірації дозволили йому видавати журнал відносно тривалий період часу за непростих тогочасних суспільно-політичних обставин. Небезпека викриття видавців журналу змусила В. Чорновола ретельно підібрати обмежену кількість помічників.*

*З’ясовано, що В. Чорноволу вдалося успішно організувати канали розповсюдження журналу, особливо, налагодити нелегальне переправлення через радянський кордон на Захід. Завдяки тому, що за кордоном журнал перевидавався значними накладками його читачка аудиторія вельми зростає. Виявлено, що матеріали “Вісника” об’єктивно, ґрунтовно і відносно швидко надали громадськості як у середині країни, так і за її межами інформацію про діяльність борців за свободу та репресії влади. Таким чином, “Український вісник” перетворився на надзвичайно дієвий інструмент провадження українським національним рухом інформаційної війни з радянським режимом.*

**Ключові слова:** “Український вісник”, В. Чорновіл, журнал, самвидав, національний рух.

**The Problem Statement.** In the 1960s, the methods of struggle of the members of the Ukrainian national movement changed. New realities led to the transition to cultural and educational activities. The word spread through self-publishing became the primary weapon. The effectiveness of the information struggle increased significantly with the appearance of the self-published underground journal “The Ukrainian Herald”. The periodic edition of the journal issues made it possible to convey relevant information to readers systematically. “The Ukrainian Herald” became the printed organ of the Resistance movement. Therefore, “The Ukrainian Herald” as a factor in developing the Ukrainian national campaign in the early 1970s is an essential topic for scientific studies. The necessity of researching the role and significance of “The Ukrainian Herald” in the Ukrainian history of the second half of the 20th century is actualized by the repeated attempts to resume its publication in the 1970s after the arrest of its editor. In addition, the journal’s influence played an essential role in unfolding the struggle for personal and national freedom in the second half of the 1980s.

**The Analysis of Recent Research and Publications.** A significant influence of “The Ukrainian Herald” on the development of the national movement attracted the attention of researchers who studied the activities of public activists in the 1960s – 1980s. With the restoration of Ukraine’s independence, several studies on the Ukrainian national movement of 1960 – 1990 appeared. These are books by H. Kasyanov (Kasyanov, 2019), A. Rusnachenko (Rusnachenko, 1998), B. Zakharov (Zakharov, 2003) etc. In the majority of books, the subject of which was the Ukrainian resistance movement of the 1960s – 1980s, the essential information about “The Ukrainian Herald” is considered. However, there are some factual inaccuracies in them regarding the publishers, the correspondent network, the distributors of the journal, etc. The authors of other books and articles made similar mistakes (Berdykhovska,

2004, pp. 10–31; Lys, 2008). They are contained in the book by O. Obertas (Obertas, 2010). Information about the journal can be found in the book “Viacheslav Chornovil: the Spirit that Tears the Body to Battle” (Derevynskyi, 2016). The specifics of the criminal proceedings regarding the search for the publishers of “The Ukrainian Herald” in the early 1970s are discussed in detail in the article “The Ukrainian Herald” journal as an object of criminal proceedings by the KGB in 1971 – 1974 (Derevynskyi, 2019, pp. 407–417). Measures taken by the Soviet authorities to oppose the restoration of “The Ukrainian Herald” publication after the arrest of V. Chornovil in the 1970s are considered in the article by B. Paska (Paska, 2022b).

**The purpose** of the article is to study the self-published underground journal “The Ukrainian Herald” as a factor and component of the struggle of the Ukrainian national movement in the early 1970s. The research objectives are to study the reasons for creating the journal, the peculiarities of the formation of the publishing team, the conditions for the preparation, printing and content of the journal. The chronological limits of the article cover the period from 1969 to 1972. The establishment of the specified limits of the research is connected with the first period of activity of the editorial office of V. Chornovil in publishing the journal.

**The Results of the Research.** At the end of the 1960s, the Soviet repression against the figures of the Ukrainian national movement continued to intensify. Under the pressure of the authorities, their activity decreased. Some isolated themselves from protests against the regime’s arbitrariness, and some took the position of non-conformism. Under such circumstances, the Ukrainian resistance atomization process took place. Seeing a severe threat of losing the momentum of the struggle for freedom, the leading figures of the Ukrainian movement considered what methods to use under the new conditions.

Viacheslav Chornovil, one of the most active figures of the Ukrainian resistance to the Soviet totalitarian regime, considered it necessary to strengthen the informational component of the struggle. In his opinion, various actions carried out by the Ukrainian activists needed an objective, thorough and quick publicization both within the country and abroad. In the absence of prompt dissemination of information about the activities of the Resistance movement, under the conditions of growing repressive pressure, the authorities dismantled the movement’s activists. That is why, V. Chornovil decided to establish, so to speak, a printed organ of the Ukrainian national movement. Viacheslav Chornovil reflected the functional purpose of such a publication for the campaign in its name – “The Ukrainian Herald”. In other words, the informative voice of invincible Ukrainian fighters.

At that time, a similar Ukrainian publication did not exist in Ukraine. Although isolated attempts took place to print underground newspapers and journals, their distribution and information content only went beyond the regional dimension. They were unknown to the mass Ukrainian and foreign readers.

The importance of the information tribune for the national movement was confirmed by publications that appeared at that time. In 1968, Nataliya Gorbanevskaya founded “The Chronicle of Current Events” newsletter in Moscow. In the early 1970s, the press bodies of other national movements appeared. Thus, since 1965, a newsletter of the Crimean Tatar national movement has been published.

After V. Chornovil served a one-and-a-half-year prison term for his political views, he was released in early 1969. He immediately discussed publishing the organ of the movement with several leading figures of the Ukrainian national movement. Considering that it was



the time of the defeat of the Sixties, which mainly used educational and cultural methods of activity, not everyone with whom V. Chornovil communicated and agreed to launch a new dimension of the struggle against the totalitarian regime. The activities of the members of the national movement at the latest stage of the battle had to be based on the understanding that it was impossible to change the policy of the ruling Communist Party regarding the neglect of personal or national rights. Therefore, it is necessary not to try to modernize the Soviet government, but to fight against the Soviet totalitarian regime, to seek the right to national self-determination. Especially since the Soviet regime moved away from “cosmetic liberalism” and started a new total pogrom of the Ukrainians. Therefore, those who agreed to work with V. Chornovil on the publication of the organ of the movement understood the threat of repression for themselves and their loved ones.

In 1969, V. Chornovil formed the editorial staff of an underground self-published journal from such brave men as himself. These people set themselves a super-task under the conditions of a large-scale Soviet control over all spheres of the Ukrainian society (Kononenko, 2019, p. 170; Kotsur, 2021, p. 156), especially over the Ukrainian activists or simply people who supported the Ukrainian national development or had their view of the situation in Ukraine. As it turned out, at the end of the 1960s, they were the only ones who managed to start a systematic information struggle against the Soviet regime. Exceptional merit in deploying this informational resistance belongs to V. Chornovil, who rallied like-minded people. At that time, the leading figures of the Ukrainian national movement did not know anyone else except V. Chornovil, who could dare to start such risky work by publishing an illegal journal (Sverstyuk, 1997 p. 5). Professional journalistic competencies of V. Chornovil and his persistent public activity were the basis for the employees of the Soviet political exceptional service – the State Security Committee (KGB) in their operational developments to also consider V. Chornovil as the most likely publisher of the underground organ of the Ukrainian national movement (Prisovskyi, 1993, p. 67; Paska, 2022a, p. 230).

Olena Antoniv, Atena Pashko, Mykhailo Kosiv, Yaroslav Kendzior, and Liudmyla Sheremetyeva volunteered to help V. Chornovil publish the journal. They actually formed the first edition of the underground journal. V. Chornovil carried out the most considerable amount of work on the preparation of the journal because he formed the content and topics of the issues, filled them with relevant material, edited and corrected the articles of others and printed “signal copies”.

The publishing group provided him as the editor-in-chief with informational materials and articles, they also provided him with the conspiratorial working conditions for the journal’s publication, and carried out initial copying and photocopying of issues of “The Ukrainian Herald”. Thus, M. Kosiv and Ya. Kendzior performed courier functions to deliver materials for V. Chornovil. Atena Pashko showed parts of the next issue printed by V. Chornovil for copying.

Liudmyla Sheremetyeva was responsible for increasing the circulation of journal issues. She reprinted the “signal number” of the journal in the amount of 10-15 copies. The issue of the journal reprinted by L. Sheremetyeva was sent to Ya. Kendzior, who photographed it with a microphoto camera. The “signal copy” of each case, printed personally by V. Chornovil on a typewriter specially obtained for this purpose, was never made public. The conditions required this illegal publication of the journal because all typewriters had their features of text printing. Therefore, during the analysis of printed sheets, it was possible to determine the typewriter on which they were published and identify the authors of illegal literature.

Liudmyla Sheremetyeva reproduced the first three, according to other sources – four issues of the journal (Chornovil, 2006, p. 19). In the future, her activities in the “The Ukrainian Herald” publication must be stopped because the KGB employees were monitoring her. Under such circumstances, V. Chornovil did not involve anyone else in the reproduction of the journal but engaged in reproduction personally.

Regional correspondents or those responsible for collecting information from the regions were Nadiya Svitlichna and later Mykola Plakhotniuk from Kyiv and Nina Strokata from Odesa. For them to have a place to stay in Lviv at the time of their arrival with the materials, a peculiar correspondent point of the journal was set up. Its functioning was ensured by the University teacher Liuba Popadiuk in the apartment she rented on Konovaltsia Street.

In the second half of 1969, Viacheslav Chornovil prepared the first issue of the journal while working at the “Plai” weather station for polonies, located in the Carpathian Mountains near the village of Lopushne in the Carpathian Mountains Volovetsky district of Zakarpattia region. He worked there from the summer of 1969 to February of 1970. He prepared other issues in Lviv, where he lived at the time. The work was carried out in several conspiratorial apartments. In particular, in the apartment of Roman and Myroslava Stasiv. The first three issues of the journal were copied by L. Sheremetyeva in the house of Yaroslav Kendzior’s parents in the village of Solontsi near Lviv and in place of O. Antonivna’s aunt on Levandivka in Lviv. After the detention of V. Chornovil during the second large-scale arrest of Ukrainian activists in January of 1972, M. Kosiv worked on completing the sixth issue of the journal. He carried out this work in the apartment of the famous composer Stanislav Liudkevych, people’s artist Sofia Federtseva, the director of the Lviv Agricultural Institute Mykhailo Honchar, and the employees of the Mikropylyad factory in Nus and Stepan Baraniv (Kosiv, 2006, p. 39).

Several activists of the Ukrainian national movement, with whom V. Chornovil had a conversation, directly sent their materials for publication in the journal without taking part in its production. In particular, Valentyn Moroz sent such materials and his articles to two journal issues. Yuriy Shukhevych provided information for forming a list of Ukrainian political prisoners. Various materials were submitted by Vasyl Stus (Chornovil, 1987, p. 98).

Viacheslav Chornovil kept the names of the people who prepared or helped publish the journal a secret. The authors of the self-published statements and articles that were published in the journal did not know about those who publish the journal. For the first time, the journal’s editor published the names of the people who joined its publication only in 1987 in the seventh issue of the restored journal. In particular, V. Chornovil named Olena Antoniv, Nina Strokata, Nadia Svitlychna, Valentyn Moroz, Yuriy Shukhevych and Vasyl Stus. He named people the Soviet penal system could not harm at that time. The names of other people who in one way or another participated in the preparation of the journal in 1969 – 1972 were named by V. Chornovil already after the restoration of Ukraine’s independence. In particular, Atena Pashko, Anna Sadovska, Liudmyla Sheremetyeva, Yaroslav Kendzior, Mykhailo Kosiv, Yaroslav Dashkevych, Yevhen Sverstiuk, the Stasy couple, the Vozniuk-Lemkiv-Bander family, Opanas Zalyvakha, Mykola Plahotniuk (Soroka, 1997, p. 35).

It was a difficult task to publish an underground journal under the conditions of the Soviet repression and a total control by special services. Especially Issue 6, which V. Chornovil prepared during the constant search by KGB employees of the journal’s editorial board. At that time, the KGB had already opened criminal case No. 42, “The Ukrainian Herald”.

Viacheslav Chornovil was one of the first in the list of people whom the Soviet state security authorities established surveillance, not without reason considering him the most probable editor of “The Ukrainian Herald”.

That is why, his careful measures against the conspiracy to publish the journal turned out to be justified. First, restrictions on the number of people involved in its publication. He observed the regime of “informational silence” regarding “The Ukrainian Herald” during conversations with friends and acquaintances. He even avoided any statements in his apartment, which were listened to by KGB employees, which could provide evidence to the Soviet special services about his involvement in the journal. He did not keep any self-published material at home. He immediately rewrote the materials received for the preparation of “The Ukrainian Herald” and after submitting them to the next “signal copy” eliminated (Shtuka, 2010, p. 4). He worked at the typewriter with papers in new rubber gloves always so as not to leave fingerprints.

In 1970 – 1972, V. Chornovil published six issues of the journal. The first issue of “The Ukrainian Herald” was dated January 1970; the second was printed in May of 1970, the third – in October of the same year, the fourth – in January, and the fifth – in May of 1971. Issue 6 was prepared by V. Chornovil and completed by M. Kosiv in March of 1972. After this issue, the publication of the journal by Chornovil editorship stopped until the end of the 1980s.

According to Yevhen Proniuk, one of the activists of the Ukrainian national movement, the editor of “The Ukrainian Herald”, V. Chornovil, offered him to continue publishing the journal in the event of his arrest. Volodymyr Shcherbytsky, head of the branch of the Communist Party in Ukraine, wrote to the Moscow executive office of the party (the Central Committee of the Communist Party of the Soviet Union) about the existence of a “reserve editorial office” (CSAPO of Ukraine, f. 1, d. 10, c. 1398, pp. 38–45).

After the January of 1972 arrests, E. Proniuk, then a researcher at the Institute of Philosophy of the National Academy of Sciences of Ukraine, together with his colleague from the institute Vasyl Lisovyi and Vasyl Ovsienko, a student of the Faculty of Philology of Taras Shevchenko Kyiv State University, prepared in March of 1972 the so-called Kyiv issue of “The Ukrainian Herald” No. 6. They needed to learn about preparing the journal’s Issue 6 members of the Chernivtsi editorial office. Yevhen Proniuk and Vasyl Lisovyi formed the issue’s content, and Vasyl Ovsienko ensured its printing. A total of 10 copies of this issue were printed, all of which were destroyed when the authors were threatened with arrest (SSA SSU, f. 6, d. 41, c. 5, p. 243).

In 1974, Stepan Khmara, a doctor from Chervonohrad, Lviv region, Oles Shevchenko, a scientist from Kyiv, and Vitaliy Shevchenko, a journalist from Kyiv, undertook to continue publishing the popular underground journal. They printed two issues of the journal, and the materials for the third had to be destroyed due to the threat of arrest. At this point, their work on publishing the journal stopped.

In 1972 – 1979, a journal called “The Ukrainian Herald” was published by the Ukrainian All-People’s Organization (or Ukrainian National Front-2). Mykola Krainyk, a History teacher from Dolyna district of Ivano-Frankivsk region, headed it and published the journal until his arrest in 1979 (Zaitsev, 2005, p. 12).

“The Ukrainian Herald”, printed in Lviv by the editors of V. Chornovil, was primarily not distributed in Lviv region to protect the publishers from detection by the Soviet services. It was delivered to Kyiv, where it was first made public. And only after the journal issue appeared among readers of the capital “The Ukrainian Herald” was it distributed in other

cities. Couriers for the delivery of the journal, who might not have known about their mission, from Lviv to Kyiv were Valentyna Chornovil, Stefania Hulyk-Hnatenko, Hanna Sadovska, Yaroslav Dashkevych and the others (CSAPOU, f. 1, d. 25, c. 1006, pp. 23–24). In Kyiv, the journal was handed over to Alla Horska and Mykola Plakhotniuk, and the first issue was delivered to Zinaida Franko (Hulyk-Hnatenko, 2005, p. 291).

In addition to Kyiv, “The Ukrainian Herald” was also delivered from Lviv to other cities, in particular to Odesa, to N. Strokatai. She spread it among her acquaintances in Odesa (SSA SSU, f. 6, d. 68805FP, c. 15, pp. 171–179). Mykola Plakhotniuk transferred the journal from Kyiv to Transcarpathia, Vinnytsia and Sumy regions. In Kyiv, Z. Antoniuk, E. Proniuk, V. Lisovyi and the others participated in the journal’s distribution.

After that, the readers of “The Ukrainian Herald” began to reproduce the journal independently. Unorganized reprinting or photocopying of the journal led both to the quantitative growth of its copies and to the expansion of distribution boundaries. Additional circulation of the journal was recorded by the KGB employees in the western, central and southern regions of Ukraine (SSA SSU, f. 6, d. 41, c. 5, p. 225). “The Ukrainian Herald” had the form of a brochure consisting of 50 – 110 sheets of A4 format. The journal of such a large volume was not easy to transport and distribute.

Viacheslav Chornovil organized the shipment of the journal across the Soviet border. The role of the courier carrying “The Ukrainian Herald” on microfilms was performed by the student of Taras Shevchenko Kyiv State University, Hanna Kotsur, who was originally from Priashivshchyna (Czechoslovakia). She transported the first four issues of the journal, which were given to her by Zinovii Antoniuk (the first and third issues), Valentyna Chornovil (second issue) and Mykola Plakhotniuk (the fourth issue) (SSA SSU, f. 6, d. 41, c. 1, pp. 288–289). Although, according to Ya. Kendzior’s testimony, he personally handed over the tapes with the first and second issues of “The Ukrainian Herald” to P. Murashko when he was in Ukraine, and H. Kotsur transported only the third and fourth issues. Outside of Ukraine, she gave the tapes to the same Pavlo Murashka, who worked as an assistant at the Department of Ukrainian Literature of the Faculty of Philology of Košice University named after Shafarik, or Petro Grotskiy – a teacher of the Priashiv Secondary Pedagogical School. They were making photographs, reprinted the text and took pictures again. Pavlo Holovchuk, together with his friends from Yugoslavia, were ensuring the delivery of a new film from Czechoslovakia to Vienna (Golovchuk, 2007, pp. 58–74). The next stage of transportation was to Munich (Federal Republic of Germany), and then to Paris (France).

After the secret service of Czechoslovakia revealed the courier mission of H. Kotsur at the beginning of 1971, it was necessary to stop sending the journal through it (SSA SSU, f. 6, d. 41, c. 2, pp. 77–80). The fifth issue of “The Ukrainian Herald” was sent to the West by the daughter of Ivan Franko – Anna Franko (Vilkha, 2002, p. 2), and the sixth issue was sent by Ya. Kendzior by the rowing athletes P. Rydyk and R. Kropivnyk, who were going to international competitions.

All four issues of “The Ukrainian Herald”, which were delivered abroad via Czechoslovakia, were printed by the Ukrainian Smolokyp publishing house named after Vasyl Symonenko. The publishing house was then located in Baltimore (USA). This publishing house also published the sixth issue of the journal. The first, second, fourth, and sixth numbers of the Smolokyp publishing house were printed jointly with the First Ukrainian Printing House in France, located in Paris. The third issue was published in cooperation with the publishing house “New Way” from Winnipeg. The first and second issues were published in one book,

the others – separately. The fourth issue was printed as a separate book in the “Ukrainian Publishing Union” in London, which reprinted it from the Ukrainian London journal “The Liberation Path”. The fifth issue was not reprinted abroad. Probably due to a change in the shipping route from Ukraine, this issue did not get to the Smoloskyp publishing house or to others. According to the available data, it is known that the fifth number got abroad, information about its contents was made public by the Ukrainian Central Information Service in London, and its typewritten copy was in the archive of N. Strokata in the USA.

Separate materials of the “The Ukrainian Herald” were reprinted by various publications, both Ukrainian diaspora and foreign. The entire collection or its excerpts were read on the air by various radio stations, including “Freedom”, “Voice of America”, “BBC”, “German Wave”, “Voice of the Vatican” and the others.

“The Ukrainian Herald” played an important role in spreading Ukrainian narratives in the world information space. The considerable amount of information collected in the journal about social and political processes in Ukraine provided readers from different countries with thorough data about the Ukrainian national movement, its ideas, measures, and confrontation with the Soviet regime. V. Chornovil said that, according to Western analysts, “without Herald, it would be difficult to understand the situation in Ukraine at the end of the 60s and the beginning of the 70s.” (Soroka, 1997, pp. 2–36). A similar vision of the meaning of the journal was stated by the Smoloskyp publishing house in the preface to the journal (Chornovil, 1971, p. 9).

Owing to the broadcasts of Western radio stations, information about “The Ukrainian Herald” reached listeners in Ukraine, who managed to listen to banned radio broadcasts despite the Soviet system of “jamming” foreign radio signals. The journal arrived in Ukraine from abroad also by mail, sometimes to the addresses of some organizations or strangers (SSA SSU, f. 6, d. 41, c. 3, pp. 77–78).

Viacheslav Chornovil, with the help of “The Ukrainian Herald” publication, sought to provide citizens with objective information, which they were deprived of due to total Soviet censorship (Baran, 2022, p. 187). In the magazine, he published data on the specifics of the socio-political situation in the country, the struggle for personal and national rights, government repression, Ukrainophobia, etc. In addition, he published journalistic articles, documents, artistic works and other materials that had already become widespread in self-publishing (Chornovil, 1971, p. 11).

When selecting materials, V. Chornovil followed their sequential presentation in the journal issues by the established principle of organizing materials. It was assumed that each number should be dedicated to some important topic of the Resistance movement.

To protect himself from exposure by the KGB authorities, V. Chornovil deliberately levelled his contribution to the publication of the “The Ukrainian Herald”, carrying out only superficial, elementary and primitive editing of texts.

Materials under the heading “Chronicle” were of a considerable relevance and importance. In a chronological order, it provides information about numerous facts of mass persecution of citizens.

That is, the publishers of the journal were printing a significant amount of self-published materials in “The Ukrainian Herald”, which were distributed in Ukraine. There was information about many activists of the Ukrainian resistance, about their ideas, actions, persecution by the Soviet regime. A variety of journalistic and literary works were published that could not reach readers from official censored publications or books. “The Ukrainian Herald” became the informational voice and tribune of the Ukrainian undefeated fighters who fought for



personal and national freedom. The systematic publication of journals provided information to many activists, sympathizers or even those who were not aware of the real situation of the Ukrainian people under the control of the Soviet government. “The Ukrainian Herald” acted as a kind of informational motivator and communicator for those who hesitated under the pressure of repression or were looking for like-minded people.

“The Ukrainian Herald” became too dangerous an underground publication for the Soviet regime. The KGB employees were given instructions to identify and liquidate the publishers of the journal. Their activities to find publishers of “The Ukrainian Herald” intensified after the secret resolution of the governing body of the ruling Communist Party in June of 1971 on measures to combat “politically harmful” self-publishing and there-publishing.

The key measure of this repressive campaign was the mass arrests of January of 1972. In total, about 90 people lost their freedom then, and many were subjected to various persecutions. The main goal of these measures was to identify the publishers and stop the printing of “The Ukrainian Herald”. These repressions turned out to be the second mass arrests of dissidents after 1965, but the KGB employees did not manage to find irrefutable evidence of the involvement of specific individuals in publishing the journal (Derevynskyi, 2019, p. 409). Members of the publishing team did not provide investigators with any information about the journal or its editor during interrogations. Therefore, V. Chornovil managed to avoid both the defeat of the publishing team and the arrest of all those involved in the publication of the journal, as well as the imposition of a criminal sentence by the Soviet court as the editor of “The Ukrainian Herald”.

**The Conclusion.** Thus, under the conditions of a total control and persecution by the Soviet special services, Viacheslav Chornovil managed to create and publish an underground self-published journal. At all stages of the publication of the journal, he followed a strict conspiracy: starting from the collection of information, the processing of editorial materials, the printing of the “signal copy” and the reproduction and distribution. The meticulous means of the conspiracy allowed him to publish the journal for a relatively long period of time under the existing socio-political circumstances. The danger of exposing the publishers of the journal forced V. Chornovil to carefully select a limited number of assistants. The optimally created organizational structure of “The Ukrainian Herald” nevertheless counted a significant number of people. No other underground editorial offices of the Ukrainian publications in the 1960s and 1970s had such a number of functional employees. The members of the publishing team effectively performed their tasks, and during the arrests and interrogations, they did not reveal their or V. Chornovil’s involvement in the production of the journal.

Viacheslav Chornovil organized the distribution channels of the journal successfully. In particular, he established the illegal transportation of “The Ukrainian Herald” across the Soviet border to the West. Due to the fact that the journal was reprinted abroad in large numbers, the readership of “The Ukrainian Herald” grew greatly. Its materials objectively, thoroughly and relatively quickly provided the public both in the middle of the country and outside the country with information about the activities of freedom fighters and the repressions of the authorities. “The Ukrainian Herald” turned into an extremely effective tool for the Ukrainian national movement’s information war with the Soviet regime.

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**DIGITALIZATION OF EDUCATIONAL AND SCIENTIFIC PROCESSES  
IN THE UKRAINIAN PUBLIC DISCOURSE (1991 – 2023)**

**Abstract.** *The purpose of the research is to carry out a comprehensive study on the educational and scientific processes digitization features in Ukraine and its reflection in the Ukrainian public opinion in the context of educational reforms and socio-political processes in our country. The methodology of the research is based on the principles of historicism, systematicity and objectivity in the approach to covering the events of the past based on a comprehensive study of sources and scientific literature. General scientific (systematization, typology, retrospection) and special historical (problematic chronological, historical comparative, critical analytical, biographical) methods have been used to solve the tasks. The scientific novelty consists in the fact that the digitalization of the educational and scientific process was considered through the prism of the public reaction to the innovations of central authorities and its attempts to modernize the educational sphere in line with the leading European trends in education and science for the first time in the Ukrainian scientific opinion. The Conclusion. It has been stated that the process of the educational sphere digitalization in Ukraine started at the turn of the 20th and 21st centuries, although during this period there was a lack of (a) proper material*

and technical base in secondary and higher education and (b) qualified personnel capable of working in a new educational paradigm. It has been noted that the society was not ready for the revolutionary transformations in education, which were based on digitalization and tended to the post-Soviet model of organizing the educational process. It has been emphasized that only during the last decade, especially during the coronavirus pandemic, digital technologies (cloud technologies) became the part of an everyday life at secondary and higher schools, and on a level with traditional education, society begun to use non-traditional and innovative products (electronic textbooks, distance-learning courses, electronic libraries, etc.).

**Key words:** Ukraine, digitalization, education, science, public discourse, computerization, information and communication technologies, innovations, educational process.

## ЦИФРОВІЗАЦІЯ ОСВІТНЬО-НАУКОВИХ ПРОЦЕСІВ В УКРАЇНСЬКОМУ СУСПІЛЬНОМУ ДИСКУРСІ (1991 – 2023)

**Анотація.** *Мета статті* полягає у комплексному дослідженні особливостей цифровізації освітньо-наукових процесів в Україні та її відображенні в українській суспільній думці у контексті освітніх реформ та суспільно-політичних процесів у нашій державі. **Методологічну основу** роботи становлять принципи історизму, системності й об'єктивності у підході до висвітлення подій минулого на основі комплексного вивчення джерел та наукової літератури. При розв'язанні поставлених завдань використано загальнонаукові (систематизації, типологізації, ретроспекції) та спеціально-історичні (проблемно-хронологічний, історично-порівняльний, критично-аналітичний, біографічний) методи. **Наукова новизна.** Чи не вперше в українській науковій думці цифровізацію освітньо-наукового процесу розглянуто крізь призму суспільного реакції на новітні центральних органів влади та її спроб модернізувати освітню сферу у руслі провідних європейських трендів в освіті та науці. **Висновки.** Констатовано, що процес цифровізації освітньої сфери в Україні започатковано на зламі XX – XXI століття, хоча у цей період відчувалася нестача (а) належної матеріально-технічної бази у середній та вищій школі та (б) кваліфікованих кадрів, здатних працювати у новій освітній парадигмі. Зазначено, що суспільство не було готове до революційних перетворень в освіті, які ґрунтувалося на цифровізації та тяжіло до пострадянської моделі організації освітнього процесу. Відзначено, що тільки упродовж останнього десятиліття, особливо у період пандемії коронавірусу, цифрові технології (хмарні технології) глибоко увійшли у повсякдення середньої та вищої школи, а на рівні з традиційною освітою суспільство почало користуватися нетрадиційною та інноваційними продуктами (електронні підручники, дистанційні курси, електронні бібліотеки тощо).

**Ключові слова:** Україна, цифровізація, освіта, наука, суспільний дискурс, комп'ютеризація, інформаційно-комунікативні технології, інновації, навчальний процес.

**The Problem Statement.** The educational and scientific sphere of Ukraine is undergoing a period of digitalization – due the computerization of the educational process and scientific activity there is a gradual increase of digital technologies. The above-mentioned process is being accepted by the Ukrainian society in different ways, but the obvious progress of the Ukrainian education and science provides the proof regarding the irreversibility of the processes. Owing to digitalization, the Ukrainian education is developing along the European lines with the tendency inherent in the European secondary schools to develop personalized educational trajectories at secondary schools and to merge education, science and practice in higher education.

The digitalization of the educational process is depicted in the socio-scientific discourse of the modern Ukrainian state as mostly: a modern requirement of the information society (Nikolaiesku & Shynkarova, 2022); the new reality of Ukraine (Sosnin, 2019); the pledge of the national security of Ukraine (Liakhotskyi & Liakhotska, 2019); a leading vector of training of specialists of the 21st century (Demianchuk & Bodnaruk, 2022) and the others.



The above-mentioned epithets of digitalization require an in-depth study of the nature of this phenomenon, its introduction into the educational process at all levels, and society reaction to innovative trends in education in recent years.

**The Analysis of Recent Research and Publications.** Some Ukrainian scholars (historians, political scholars, teachers) tried to find answers to the tasks set before the author of the article in the direction of much broader thematic niches (for example: “Innovative Technologies in the Modern Educational Space” (Yefremova, 2020), “Social, Economic and Educational Transformations in the Digital Age” (Leonov, 2022), “Digital Transformation of Open Educational Environments” (Bykov & Pinchuk, 2019), “Modernization of Education in the Digital Dimension” (Modernizatsiia osvity, 2019), “Digitization of Education is an Imperative of the Times” (Tsyfrovizatsiia osvity – imperatyv chasu, 2021), “Innovative Technologies for Teaching Computer Science Disciplines” (Medvedeva & Tiahay, 2021), “Digital Technologies in Education: Modern Experience, Problems and Prospects” (Tsyfrovi tekhnolohii v osviti, 2022) та ін.). There is no comprehensive study in the Ukrainian historical and pedagogical scientific opinion for the time being, which would be devoted to highlighting the educational and scientific sphere digitalization issue in Ukraine in the vision of the Ukrainian public opinion. The latter thesis actualizes the research and served as the basis for writing the article.

**The Results of the Research.** There are two periods, which could be distinguished in the digitization of the educational and scientific sphere of Ukraine: 1) the first period of 2002 – 2010 is characterized by a wide use of computing equipment, computers and software against the background of a dialogic human computer interaction, which opened up new opportunities in the educational sphere; 2) the second period includes the 2010 – till present: is characterized by the use of modern computers, high-speed storage devices of large capacity, the use of special social networks / services in educational activities in the educational and scientific process, as well as the use of innovative information and telecommunication technologies, multimedia technologies and virtual reality systems, etc. (Lytvynova, Marienko, Nosenko, Sukhikh & Yatsyshyn, 2022).

Numerous scholars trace the beginning of the “digital revolution” to 2002 not only in Ukraine, but also on the European continent in general, when the amount of digital data stored in the world exceeded the total amount of analogue data for the first time (Apalkova, 2015). However, the educational and scientific sphere digitalization of Ukraine was not so common until 2010, which caused misunderstanding among a significant part of society (Holovaha & Makyeev, 2022, p. 132). The scientific and pedagogical workers at secondary and higher schools were often accused of the excessive conservatism, inability to prepare students for a real life, outside the walls of educational institution, inefficient models of learning and teaching, inability to adapt to changes quickly (Holovaha & Makyeev, 2022, p. 132). The scholars noted the following: “Such point of views on education are quite typical of the post-industrial world, in which changes are taking place instantaneously” (Holovaha & Makyeev, 2022, p. 132).

The central authorities tried to respond to society’s requests in the educational and scientific sphere. In particular, Law of Ukraine No. 537-V “On the Basic Principles of the Development of the Information Society in Ukraine for 2007 – 2015” dated January 9, 2007 (Zakon Ukrainy, 2007) was adopted in order to accelerate the information society development in Ukraine, in which considerable attention was paid to the educational and scientific sphere improvement issue in terms of training a person for work in the information society (Ivanova, 2020). The lawmaker stated the following: “One of the main conditions for

a successful implementation of the Basic Principles is the provision of training, education, and professional training of a person to work in the information society” (Zakon Ukrainy, 2007). Taking the above-mentioned into account, it was considered appropriate:

- to develop the national scientific and educational space, which will be based on the union of various national multipurpose information and communication systems;
- to develop methodological support for the use of computer multimedia technologies in the teaching of school subjects and disciplines, taking into account in the education systems of students of pedagogical higher educational institutions and the retraining of teachers in the specifics of information and communication technologies (ICT) work;
- to ensure the priority of the ICT specialists training;
- to improve curricula, open new specialties from the latest ICT, implement the principle of “lifelong education”;
- to create distance learning systems and ensure on their basis the effective implementation and use of ICT at all educational levels of all forms of education;
- to provide educational institutions and scientific institutions with modern economic and effective ICT tools and vital information resources at the appropriate level;
- to ensure free access to ICT and information resources, especially in rural and hard-to-reach areas;
- to increase computer literacy of population, in particular pensioners, low-income people, people in need of social assistance and rehabilitation, peasants, on the basis of cooperation between a private sector of economy and local self-government bodies;
- to ensure development of the national scientific and educational information network and information resources in the main fields of knowledge, its connection, in particular, to European scientific and educational networks (Zakon Ukrainy, 2007).

According to the Decree of the Cabinet of Ministers of Ukraine No. 988-r “On the Approval of the Concept of State Policy Implementation in the Reform of General Secondary Education “New Ukrainian School” for the period until 2029” issued on December 14, 2016 (Rozporiadzhennia Kabinetu Ministeriv Ukrainy No. 988-r, 2016) it is recommended introduce ICT elements into the educational process (Rozporiadzhennia Kabinetu Ministriv Ukrainy № 988-r, 2016). The concept included the National Educational Electronic Platform (NEEP) creation in 2017 – 2018 in order to store electronic courses and textbooks, the development of electronic textbooks, distance learning courses according to educational programs, a distance learning system for improving qualifications of teachers (Rozporiadzhennia Kabinetu Ministriv Ukrainy № 988-r, 2016).

According to the Concept, electronic textbook, as well as auxiliary technical means of electronic platform, were offered to be introduced in the format of an experiment. However, as it was stated by a scholar M. Karpenko, offered electronic textbooks became only versions of paper textbooks in Portable Document Format (PDF) (Karpenko, 2020). The above-mentioned format did not use the multimedia capabilities of digital information transmission (interactivity, dynamic iconography, video content, etc.) (Karpenko, 2020).

Unfortunately, the NEEP project was not implemented (the platform was supposed to collect interactive educational materials for pupils, educational materials for teachers (methodical materials, video lessons, recommendations), pieces of advice for parents on their communication with school staff, etc.)) although there was provided 54 million hrn. in the 2018 state budget of Ukraine (Karpenko, 2020). As a result, the Chief Consultant of the Department of Humanitarian Policy and Civil Society Development of the Center for Social

Studies of the National Institute of Strategic Studies, A. Ishchenko considered it expedient to create the National Platform for Digital Education (NDPE) as one of the main means of the digitalization of education, since the implementation of the previous stage – the National Educational Electronic Platform creation and implementation failed (Ishchenko, 2020).

In addition, according to A. Ishchenko, “along with the digital educational content, digital educational services should play a key role in the modern educational process – as well as properly standardized and tested means and tools for organizing the educational process and using modern multimedia content in it” (Ishchenko, 2020). First of all, these are means of vertical (a teacher-student) and horizontal (a student-student) interaction (exercises, tests, projects), tools for working in small and large groups, aimed at “developing skills and abilities of the 21st century and ensuring constant control of educational successes, ensuring the necessary differentiation of the educational process and individual educational trajectories adjustment in time” (Ishchenko, 2020).

The Decree of the Cabinet of Ministers of Ukraine No. 67-r issued on January 17, 2018 approved the “Concept for Development of Digital Economy and Society of Ukraine for 2018 – 2020” (Rozporiadzhennia Kabinetu Ministeriv Ukrainy No. 67-r, 2018), in which it was noted that digitalization is saturation of a physical world with electronic and digital devices, means, systems and establishment of electronic communication exchange between them, which in fact enables the integral interaction of the virtual and physical, i.e. creates a cyber-physical space (Rozporiadzhennia Kabinetu Ministriv Ukrainy № 67-r, 2018). Hence, digitalization became a recognized mechanism of the economic growth due to the ability of technologies to have a positive influence on the efficiency, effectiveness, cost and quality of economic, public and personal activities (Ivanova, 2020).

The concept formulated the basic principles of digitization, in particular, it should: provide every citizen with equal access to services, information and knowledge provided on the basis of information, communication and digital technologies; be aimed at creating advantages in various spheres of an everyday life; it should be carried out through the mechanism of economic growth by increasing efficiency, productivity and competitiveness from the use of digital technologies; it should promote development of information society and mass media; focus on international, European and regional cooperation with the aim of integrating Ukraine into the EU, entering the European and world markets; it should be accompanied by an increase in the level of trust and security, etc (Ivanova, 2020).

The central authorities carried on pondering over the creation of a truly functioning digital education system as a significant priority of the state policy of Ukraine and were reflected in other strategic documents: Regulations on the Unified State Web Portal of Digital Education “Diia. Digital Education”, Regulations on the National Educational Electronic Platform, the State Strategy for Regional Development until 2027, the Strategy for the Development of Higher Education in Ukraine for 2021 – 2031, etc. (Nikolaiesku & Shynkarova, 2022). The Committee of the Verkhovna Rada of Ukraine on Digital Transformation, the Institute of Digitalization of Education of the National Academy of Pedagogical Sciences of Ukraine (NAPN of Ukraine), later on – the Ministry of Digital Transformation of Ukraine, non-state institutes, etc. worked on solving the educational and scientific sphere digitization issue of Ukraine actively (Apalkova, 2015).

Chief focus should be on the work of the Directorate of Digital Transformation of the Ministry of Education and Science of Ukraine, which worked on: providing educational institutions with broadband Internet access, computer equipment and STEM laboratories; development

of digital competence of educators; digitization and automation of management activities in the field of education and science; implementation of electronic queues for preschool and general secondary education institutions; introduction of comprehensive tools for assessment by educational institutions of their level and state of digital development; modernization of existing capacities of Ukrainian e-infrastructures, etc (Za tsyfrovizatsiieiu, 2021).

The coronavirus pandemic, which numerous scholars considered to be a driver of educational innovations, made significant adjustments to the process of digitalization of the educational and scientific sphere of Ukraine (Karpenko, 2020). “For the Ukrainian educational system, this test became a kind of incentive that opened a window of new opportunities, acting as a catalyst for long-overdue modernization changes in national education”, M. Karpenko noted in this regard (Karpenko, 2020). Under the conditions of the pandemic, traditional forms and methods of education were cancelled, and the entire educational process was moved to a virtual space (Holovaha & Makyeev, 2022). “Certainly, not all educational institutions were ready for this”, the educators noted. – On the one hand, there was a lack of powerful computers and network equipment, on the other hand, insufficient digital competence, methodical and psychological unpreparedness for the new format of education, lack of experience in “total” online teaching and communication were indicated. A lot of difficulties arose during the teaching of natural, technical and creative disciplines, defense of qualification works” (Holovaha & Makyeev, 2022).

At the same time, there were launched diverse educational initiatives, in particular the projects “Learning without Borders”, “Kindergarten Online”, “Informative Online Meetings for Children and Teenagers”, etc. new tools for distance and mixed learning were developed and implemented (webquests, cooperation posters, online olympiads and competitions) (Holovaha & Makyeev, 2022). The so-called smart schools began to appear, that is, those that use IT technologies in their direct work. In the majority of cases, the above-mentioned schools related to the development of a popular direction of STEM education (S – science, T – technology, E – engineering, M – mathematics), within which the students were suggested using innovative technologies in learning process (Holovko, 2020). Consequently, the project “Digital Agenda for Ukraine 2020” (“Digital Agenda for Ukraine 2020”), which was presented by the Cabinet of Ministers of Ukraine, determined the main priority positions for the development of the information society in our country on the basis of integration into global processes of “digitalization” (Apalkova).

The central authorities promoted the launch of the first Ukrainian online platform the “All-Ukrainian School Online” (VSHO), which scholars considered to be “a high-quality and lightning-fast response to the challenges of the pandemic, which isolated millions of Ukrainian children and teachers at home” (Osvita – naiprybutkovisha investytsiia, 2023). Owing to VSHO, the Ukrainian teachers mastered the tools of distance learning (nowadays, VSHO stores more than 3,5 thousand video lessons on 18 basic school subjects for students of grades 5 – 11, about 3 million Ukrainians from over 80 countries use the platform) (Osvita – naiprybutkovisha investytsiia, 2023).

The government of Ukraine focused on the national online educational platform for a digital literacy “Diia. Digital education”, which consisted of five courses for different target audiences and has the form of the series, under the conditions of the coronavirus pandemic. The Ministry of Digital Transformation created an overview educational series “Quarantine: Online Services for Teachers” aimed at setting up communication between the teachers and the students for the period of distance learning (Uriad zapustyv osvithnii serial, 2020) (it was

about algorithms and communication between the teachers and the students for the period of distance learning, as well as a set services and the specifics of their use for teachers, including Google Classroom, Microsoft Teams, Cisco Webex, Zoom, Class Dojo, Classtime, Viber, etc.) (Uriad zapustyv osvithii serial, 2020). In addition, the Cabinet of Ministers of Ukraine initiated the creation of a free electronic magazine, a self-assessment tool SELFIE for educational institutions, the “Internet Subvention”, owing to which approximately 5,000 schools were connected to the high-speed Internet (Fedorov, 2021).

In the spring of 2021, as part of the initiative, which was called the “Laptop for Every Teacher” (implemented by the Ministry of Education and Science of Ukraine, the Ministry of Digital Transformation of Ukraine), it was planned to purchase more than 60,000 laptops for Ukrainian teachers (from the state budget, 980 million hrn. was allocated for the purchase of equipment) (Fedorov, 2021). The computer equipment could be purchased by local self-government bodies, using part of “New Ukrainian School” subvention, as well as with the funds from local budgets (Fedorov, 2021).

Thus, during the coronavirus pandemic, digitization of educational and scientific process was aimed at ensuring the continuity of learning process, i.e. life-long-learning, as well as its individualization based on the advanced-learning-technologies. The scholars made the following conclusion: “There is no established definition of this term yet, but it includes the use in education of significant data on the process of mastering certain disciplines by individual students and, in many ways, automatic adaptation of educational process based on them; the use of virtualization, augmented reality and cloud computing and many other technologies” (Osoblyvosti tsyfrovizatsii, 2019).

During the period of 2019–2022, the scholars of the Institute of Digitization of Education of National Academy of Sciences of the Ukrainian Academy of Pedagogical Sciences conducted a large-scale study aimed at identifying the educational resources, electronic learning tools that were in the greatest demand among teachers of general secondary education institutions, and found out the state of the educators’ readiness to use digital tools in order to ensure distance learning to students. The total number of teachers, who were involved in the survey was 54,254 from all regions of Ukraine (Bykov, 2022).

The educational trainings, seminars and webinars were organized and held for school teachers, teachers of professional (vocational technical), professional pre-higher and higher education institutions, in which more than 4,5 thousand people took part (Bykov, 2022). Mass educational trainings and webinars were held for the pedagogical workers under the conditions of the pandemic in order to increase the level of digital competence: “Office 365 Marathon”, “The Problems and Prospects of the Primary School Educational Environment Development based on Smart Kids Technology”, “Distance Education: Preparation Checklist”, the “All-Ukrainian Online Conference on Distance Education and Educational and Research Work in Educational Institutions”, “The Computer Modeling in the Educational Process of General Secondary Education Institutions”, “Designing a Cloud-Oriented Methodical System for Training Teachers of Natural and Mathematical Subjects to Work in Scientific Lyceums”, “The Scholars of the National Academy of Sciences of Ukraine – for the Ukrainian Teachers”, “Digital Competence of the Modern Teacher of the New Ukrainian School” and the others (Bykov, 2022).

As part of primary school reform, the Academy of Smart People was created by the National Academy of Sciences, in which 600 teachers were able to improve their intellectual competence in the use of electronic educational game resources, the organization of distance



learning, the use of digital services, and the improvement of skills in working with digital equipment (Bykov, 2022). In 2021, the scholars of the National Academy of Sciences of the Ukrainian Academy of Pedagogical Sciences launched the creation of the informational analytical and search reference system, which was called “The Ukrainian Electronic Encyclopedia of Education”, which should ensure the formation and systematization, unification and maintenance of the conceptual and terminological apparatus of Pedagogy and Psychology in an up-to-date state (Bykov, 2022).

The National Institute of Strategic Studies, which during the pandemic offered to the Ministry of Education and Science of Ukraine, with the involvement, as needed, of the resources of Institute for Modernization of the Content of Education and the Ministry of Digital Transformation of Ukraine did not remain aloof from the digitalization process of education:

- to ensure the monitoring of the use of digital technologies in the educational process during the quarantine in order to accumulate experience of successful and unsuccessful practices with their further analysis and use of the obtained results in the formation and implementation of effective educational policy;

- to resume work on the National Educational Electronic Platform creation as soon as possible;

- to prepare new normative documents regarding the standards of electronic textbooks and requirements for their examination;

- to consider the possibility of creating a division of digital and distance (online) education in the Ministry, the function of which will be formation of state education policy in the relevant directions for an effective modernization of the national education system;

- to speed up work on the regulatory and legal support of mechanisms for recognizing learning outcomes obtained through non-formal and informal education (Karpenko, 2020).

An online survey conducted by scholars of the Institute of Information Technologies and Teaching Aids of the National Academy of Sciences of Ukraine in the period from March 27 to April 4, 2020 showed that 61% of teachers were actively engaged in self-education to ensure and organize distance learning (the main demand is for author’s lessons on the YouTube channel – 72,9%, materials for educators on EdEra – 42,3% and Prometheus – 32,5%) (Ovcharuk & Ivaniuk, 2023). The webinars, online courses and master classes, online conferences, online seminars and projects were considered to be the most efficient forms of the professional development by the pedagogical workers. On the bright side, the teachers began to master new online tools and search for learning platforms that were convenient for themselves and their students, allowing for group distance learning (Ovcharuk & Ivaniuk, 2023).

The International Programme for the Assessment of Educational Achievements PISA-2018 analysed the level of readiness of the State Educational Institutions for implementation of digital education in January of 2021. Hence, it was found out that 70% of teenagers went to schools where digital technologies were not enough and they were not powerful, in addition, the availability of software was not enough for quality learning (according to the Institute of Educational Analytics, 9% of technology in Ukrainian schools – defective, and almost half of the computers in all schools are older than 5 years) (Fedorov, 2021).

At the same time, 75% of the school Principals reported that their schools had efficient resources in order to help teachers learn how to use the information technology (Chy zabezpecheni shkoly Ukrainy, 2021). The majority of school Principals noted that the teachers were encouraged to use the digital technology and had enough time and technical capabilities

to prepare lessons using the digital technology. However, 50% of the school Principals stated that the educational process in their schools was hindered by a lack of a computer equipment, more than 70% of the Principals pointed to low quality or unsatisfactory computer equipment (Chy zabezpecheni shkoly Ukrainy, 2021).

In general, almost 96% of the Heads of the educational institutions reported that they discussed with the teaching staff the possibilities of using the digital technology for the educational purposes regularly (Chy zabezpecheni shkoly Ukrainy, 2021). Hence, almost 60% reported that their teachers had a set time for meetings in order to discuss digital learning issues. Only 33% of the Heads of the educational institutions reported that they had special programs to increase the cooperation of the teachers on issues of the digital technology (Chy zabezpecheni shkoly Ukrainy, 2021).

Taking into account the sociological materials, the implementation of digitization in the educational and scientific process in Ukraine was fragmentary, which was also confirmed by the results of other sociological studies (Kucherak, 2020). Hence, when the respondents (primary school teachers of general secondary education institutions of Ivano-Frankivsk City Council) answered the question: “Do you use innovative technologies in your work?”, the results of the poll were the following: 10 answered “no” (13,5%) and 64 answered – “yes” (86,5% (Kucherak, 2020, p. 93). At the same time, difficulties arose when formulating an answer to the question of which innovations were used (22 respondents (29,7%) could not answer the above-mentioned question) (Kucherak, 2020, p. 93).

Due to the full-scale invasion of the Russian Federation on the territory of Ukraine on February 24, 2022, new challenges for the digitalization of the educational and scientific sphere in Ukraine were posed. The day before, in accordance with Decree of the Cabinet of Ministers of Ukraine No. 286-r “On Approval of Strategy for Development of Higher Education in Ukraine for 2022 – 2032” issued on February 23, 2022 (Rozporiadzhennia Kabinetu Ministriv Ukrainy № 286-r, 2022), the above-mentioned Strategy was approved, which put forward the idea that institutions of higher education (HEIs) “move to new digital learning models and create conditions in order to ensure the competitiveness of educational and research activities” (Rozporiadzhennia Kabinetu Ministriv Ukrainy № 286-r, 2022). According to the Strategy (Stratehiia, 2022), a course was established in order to intensify cooperation between Ukraine and the European Union in the field of higher education, in particular regarding:

- reforming and modernization of the higher education system;
- promoting convergence in the field of higher education within the framework of the Bologna Process;
- improving the quality and importance of higher education;
- deepening the cooperation between institutions of higher education;
- expanding the possibilities of higher education institutions;
- activation of the mobility of students, scientific, scientific and pedagogical, pedagogical workers (Semeniako, Briukhovetska & Bokhonko, 2023, p. 184).

In view of the Strategy, it is possible to formulate digitalization tasks, which must be set before the higher education institutions: providing training and upgrading the qualifications of the teaching staff of the higher education institution regarding the use of digital technologies in educational activities; the digital technologies implementation in the educational process; providing the possibility of collective use of the digital resources and free access to them in cloud services; ensuring an increase in the level of motivation for the professional use of

digital technologies by the teachers and the students; the creation of innovative development conditions through the introduction of digital technologies; provision of information and consulting services regarding the use of digital and cloud technologies with unlimited resources; accumulation, systematization and distribution of information on the use of digital and cloud technologies by the institution of higher education (Osoblyvosti tsyfrovizatsii, 2019).

On July 27, 2022, the Verkhovna Rada of Ukraine adopted the Law of Ukraine “On Amendments to Certain Laws of Ukraine Regarding the Functioning of Integrated Information Systems in the Field of Education” (Proekt Zakonu, 2022). The former Minister of Education and Science Serhii Shkarlet noted the following: “AICEM could simplify the teacher’s work with school documentation, paper reporting, and would also provide support and gradual transfer of key management processes in the field of preschool, general secondary, out-of-school and professional (vocational-technical) education into electronic format. An important innovation is also the fact that, on the basis of the system, the registration of children of preschool and school age, participants of the educational process and subjects of educational activities is envisaged (Tsyfrova transformatsiia osvity: pryiniato Zakon, 2022).

According to the adopted Law, a digital interaction between education management bodies of all levels, institutions and participants of the educational process was launched in Ukraine, which will be implemented on the basis of the software and hardware complex “Automated Information Complex of Educational Management” (AICEM). (Tsyfrova transformatsiia osvity: pryiniato Zakon, 2022). Owing to the information interaction, the participants of the educational process could make management decisions quickly and qualitatively, form and implement educational policy, in particular, on issues of distribution and redistribution of interbudgetary transfers from state and local budgets, ordering textbooks, documents on education, enrollment, expulsion, transfer of education recipients (Tsyfrova transformatsiia osvity: pryiniato Zakon, 2022).

V. Umanets noted the following: “Nowadays, digitalization is not a goal, but a means of realizing various functions of life, including the educational process”. Taking into consideration the above-mentioned factor, Deputy Prime Minister for Innovation, Development of Education, Science and Technology M. Fedorov announced plans to digitize the education system and implement a number of innovations in the spring of 2023. He initiated four vectors of work in the field of education:

- the fight against bureaucracy in educational institutions;
- digitalization of education (expansion of “Diia” to the educational direction and development of online systems for education);
- development and implementation of a strategy for the development of innovations;
- development of miltek – a cluster related to military technologies (Andrieieva, 2023).

The scientific community of Ukraine joined the digitization of the educational and scientific sphere of Ukraine. In particular, the Resolution of the Presidium of the National Academy of Sciences of Ukraine dated April 19, 2023 No. 177 and the Resolution of the Presidium of the National Academy of Sciences of Ukraine dated December 22, 2022 No. 1-2/14-238 approved the Programme of Joint Activities of the National Academy of Sciences of Ukraine and the National Academy of Pedagogical Sciences of Ukraine in 2023 –2025, in particular, it is planned to hold the V, VI, VII All-Ukrainian open scientific and practical online forum “Innovative Transformations in Modern Education: Challenges, Realities, Strategies”, All-Ukrainian scientific-practical conference “STEM – the World of Innovative Opportunities”, webinar “Artificial Intelligence: Educational Integration”, scientific-practical seminar

“Modernization of Educational Programmes for Training Students of Higher Education in the Context of Global and National Challenges” (Prohrama spilnoi diialnosti, 2023).

There were published a series of collective and individual monographs in recent years, which were devoted to certain aspects of the educational and scientific sphere digitalization of Ukraine. We would like to single out the following thorough scientific works: “Innovative Technologies in Modern Educational Space” (Yefremova, 2020), “Social, Economic, and Educational Transformations in the Digital Era” (a responsible editor S. V. Leonov) (Sotsialni, ekonomichni ta osvritni transformatsii v tsyfrovu epokhu), “Digital Transformation of Open Educational Environments: (ed. V. Bykov, O. Pinchuk) (Tsyfrova transformatsiia vidkrytykh osvritnikh seredovyshch), “Modernization of Education in Digital Dimension” (scientific editors N. Morse, O. Buynytska) (Modernizatsiia osvity v tsyfrovomu vymiri), “Digitalization of Education is an Imperative of the Time” (a general editor V. Kremin) (Tsyfrovizatsiia osvity – imperatyv chasu), “Innovative Technologies for Teaching Computer Science Disciplines” (Medvedeva & Tiahay, 2021), “Digital Technologies in Education: Modern Experience, Problems and Prospects” (Vasylieva & Petrushenko, 2022) та ін.

The analytical centre “Cedos” pays considerable attention to the problems of domestic education under the wartime conditions. The results of the centre’s specialists work (designated by them as monitoring the impact of the war on education in Ukraine) are reflected in such articles as “Education and War in Ukraine (February 24 – April 1, 2022)”, “Education in the Occupied Territories of Ukraine (February 24 – April 30, 2022)”, “Multi-subject test instead of external examination. What the applicants should await?” etc. (Holovaha & Makyeev, 2022).

The general public, scholars singled out crucial results of recent years after analysing the state of digitization of education and science, in particular:

- creation of a computer-technological platform for open education at all its levels – from preschool to postgraduate and lifelong education, based on the use of cloud computing technologies;
- improvement of technical equipment with computer systems of educational institutions, offices, laboratories, workshops, libraries;
- updating the pedagogical technologies, methodological support and content of distance and electronic learning based on the use of ICT;
- introduction of new forms of organization of the educational process, forms and methods of training (e-learning, mobile learning, joint learning, smart learning, STEM education, open online courses, mixed learning, social learning) based on cloud-based technologies, Web 2.0 technologies and electronic social services networks;
- creation and development of a computer-oriented educational and scientific environment based on national integrated electronic system-wide software and hardware tools, educational and scientific resources;
- implementation of open educational systems based on the wide use of electronic scientific and educational resources, scientometric bases of open journal systems and electronic libraries;
- development of comprehensive scientific research on the issues of informatization of education;
- formation and development of information culture and IC competences (Lytvynova, Marienko, Nosenko, Sukhikh & Yatsyshyn, 2022, p. 45).

Achievements and problems in the field of digitalization of the educational and scientific space of Ukraine were discussed at scientific conferences (eg: I International Student

Scientific Conference “Digitalization of Science and Modern Trends in its Development” (March 26, 2021, Dnipro) (Persha Mizhnarodna, 2021), II All-Ukrainian Scientific and Practical Conference “Transformation of the Ukrainian Society in the Digital Era” (March 23, 2023, Odesa) (Transformatsiia, 2023), V International Scientific and Practical Conference “Innovations in Education: Realities and Prospects of Development (May 11, 2023, Ternopil) (Innovatsii v osviti, 2023), The 1st All-Ukrainian Scientific and Practical Conference “Digital Transformation of Education and Science” (March 2–3, 2023, Kharkiv) (Tsyfrova transformatsiia osvity i nauky, 2023), International Scientific and Practical Conference “Education as a Factor in Formation of Creative Competences under the Conditions of a Digital Society”, November 27–28, 2019, Zaporizhzhia (Osvita yak chynnyk, 2019) and the others), round tables discussions (e.g.: “Distance Learning in Higher Education Institutions: Models, Technologies, Perspectives” (April 26, 2021, Lviv) (Dystantsiine navchannia u ZVO, 2021), “Scientific and Methodological Principles of Informational and Analytical Support for Digital Transformation of Education and Pedagogy under Martial Law” is dedicated to the All-Ukrainian Science Festival (May 17, 2023, Kyiv) (Naukovo-metodychni zasady, 2023) and the others), scientific and practical seminars (e.g.: “Digital Competence of a Modern Teacher of the New Ukrainian School: 2021” (March 2, 2021, Kyiv) (Tsyfrova kompetentnist suchasnoho vchytelia, 2021) and the others), webinars (for example: “Digitalization of Professional Education in the Conditions of Modern Challenges” within the XVIII All-Ukrainian scientific and practical (reporting) conference “Scientific and Methodological Support of Professional Education and Training” (March 29, 2023, Kyiv) (Tsyfrovizatsiia profesiinoi osvity, 2023)).

In April – June 2022, the Ukrainian Association of Education Researchers organized at least three large-scale events with international participation, at which both domestic and foreign scholars, in particular, discussed the problems of digitalization of education in Ukraine (forum “Education of the Ukrainian Children in Lithuania: Search for Solutions Based on of Research” (April 28, 2022), a round table discussion “Education and Educators in Conditions of War” (May 5, 2022), conference “The Ukrainian Education and Educational Research under the Conditions of War” (June 28) (Ukrainske suspilstvo v umovakh viiny)). The All-Ukrainian marathon “Digitalization of Education: Practical Experience to Overcome Educational Losses” (Dosvid tsyfrovizatsii osvity obhovoryly na trydennomu onlain-marafoni) was held on April 10-12, 2023. The issue considered were dedicated to the work of a teacher in a cloud-oriented environment, educational innovations, artificial intelligence and augmented reality. The event was held within the framework of the Programme of Joint Activities with the Ministry of Education and Culture of Ukraine by the Institute of Digitalization of Education of the National Academy of Sciences of Ukraine and the “Institute of Modernization of the Content of Education” of DNU (Dosvid tsyfrovizatsii osvity obhovoryly na trydennomu onlain-marafoni, 2023).

The importance of scientific forums, which were devoted to problematic issues in the field of digitization of the educational and scientific process in Ukraine, is difficult to overestimate, since specific offers for improving state policy in this niche were formed based on the results of their work. Thus, for example, the participants of the International Scientific and Practical Conference “Education as a Factor in the Formation of Creative Competences under the Conditions of a Digital Society” (November 27-28, 2019, Zaporizhzhia) (Mizhnarodna naukovo-praktychna konferentsiia) aimed at the further development of digital competences, the conference participants recommended the following:



- to develop digital competences, which are formed today during the teaching of almost all disciplines;
- to develop the digital infrastructure of higher education institutions with the aim of forming digital competencies as the main drivers of innovative mechanisms for implementing the concept of digital society and digital personality;
- to unite scholars in order to develop the most modern concepts, methods and approaches in the formation of creative digital competences;
- to develop promising scientific directions in order to obtain new knowledge about digital society, digital man, digital worldview, digital education;
- to form the concept of a digital society and digital education, the main stages of the development of means of accumulation and dissemination of information technologies as a factor of technological transformations in Ukraine (Mizhnarodna naukovo-praktychna konferentsiia).

**The Conclusion.** The process of educational and scientific sphere digitization emerged in Ukraine at the turn of the 20th and 21st centuries, which found a strong echo in the Ukrainian public opinion. A rapid development of the digital technologies, the Internet users growth in our country (the number of respondents, who use the Internet at home increased by about 60 times since 2001 (Bakirov, 2021)), deformed the established human activities, contributed to changes in the educational process at all levels. The central authorities in Ukraine adopted a number of legal acts that contributed to the digitalization of education and science in the last decade, as they were adapting to global trends and trends in the field of education and also provided the golden opportunity for our secondary and higher education to compete with the others on the world market of educational services decently.

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## NEWSPAPER PERIODICALS IN UKRAINE IN 1991 – 2013: FORMATION, DEVELOPMENT TRENDS

***Abstract.** Means of mass communication, in particular periodical newspapers, in the system of social relations between the government and society, play a key role in the formation of democratic institutions and the construction of a civil society. The Ukrainian experience of forming a national post-colonial media field is marked by the priorities of oligarchic groups and does not always correspond*

to democratic traditions and fundamental principles of information sovereignty. The analysis of these issues is the main **purpose** of the research. The chosen boundaries of the study allow us to analyse the sphere development during a peaceful period of the history of the independent state, which was interrupted by the Russian aggression in 2014. **The methodological basis of the research** is a comprehensive source-based analysis of historiography, archival materials on the topic, statistical data, based on the main principles of historicism and scientific objectivity, modern conceptual approaches to systematic and comparative analysis. **The scientific novelty** of publication is the proof of the hypothesis on the interdependence of publishing newspapers on the state of development of economic institutions, freedom of speech, the level of politicization of society, patriotism of state power, and foreign influence. Under the conditions of the social relations transformation, mass media perform not only informational and recreational functions, but also value-oriented, worldview functions. At the same time, both post-colonial, national and historical factors of the Ukrainian society are taken into account. **The Conclusion.** The history of the Ukrainian newspapers development is inseparable from the history of its people. The real creation and development of national newspapers became possible only after gaining independence in 1991. The most productive years were 1996 – 2002, when the potential of the newspaper sphere was accumulated at the expense of new, mainly private, publications. The research on the analysis of the relationship between the press journalism and financial, political factors under the conditions of a transitional society is of a theoretical and practical interest to both scholars and relevant state bodies.

**Key words:** newspaper, civil society, state, information policy, language, freedom of speech.

## ГАЗЕТНА ПЕРІОДИКА УКРАЇНИ 1991 – 2013 рр.: СТАНОВЛЕННЯ, ТЕНДЕНЦІЇ РОЗВИТКУ

**Анотація.** Засоби масової комунікації, зокрема газетна періодика, в системі соціальних відносин між владою та суспільством відіграють ключову роль у становленні демократичних інституцій та побудови громадянського суспільства. Український досвід формування національного постколоніального медіаполя позначений пріоритетами олігархічних груп і не завжди відповідає демократичним традиціям та засадничим принципам інформаційного суверенітету. Аналіз саме цих питань є **основною метою дослідження**. Обрані межі вивчення дають змогу проаналізувати розвиток галузі в мирний період історії незалежної держави, яку 2014 року перервала російська агресія. **Методологічною основою** дослідження є комплексний джерелознавчий аналіз історіографії, архівних матеріалів з теми, статистичних даних, спирається на головні принципи історизму та наукової об'єктивності, сучасні концептуальні підходи щодо системного і порівняльного аналізу. **Науковою новизною публікації** є доведення гіпотези, про взаємозалежність газетярства від стану розбудови економічних інституцій, свободи слова, рівня політизації суспільства, патріотичності державної влади, закордонного впливу. В умовах трансформації суспільних відносини ЗМК виконують не лише інформаційно-рекреативну, але й ціннісно-орієнтаційну, світоглядну функції. При цьому враховується як постколоніальний, так і національно-історичний фактор українського соціуму. **Висновки.** Історія розбудови української газетярської справи невід'ємна від історії свого народу. Реальне створення та розбудова національних газет стало можливим лише зі здобуттям незалежності 1991 р. Найбільш продуктивними стали 1996 – 2002 рр., коли за рахунок нових, переважно приватних, видань відбулося накопичення потенціалу газетної сфери. Дослідження, що охоплює аналіз взаємозв'язку пресової журналістики з фінансово-політичними чинниками в умовах перехідного суспільства, становить теоретико-практичний інтерес як науковців, так і відповідних органів державної влади.

**Ключові слова:** газета, громадянське суспільство, держава, інформаційна політика, мова, свобода слова.

**The Problem Statement.** A successful functioning of the state and its civil society is impossible without the development of national media, which have been and remain a source of knowledge and the most effective means of their transfer, play an important role in shaping culture, spirituality, a diverse worldview, and ultimately the nation's self-consciousness.

The media have undergone significant changes during the period under analysis. First of all, the information market itself changed, at which the Internet began to play an increasingly powerful role. In fact, there was a transition from state-owned to private media, information became a commodity. The industry development took place against the background of a permanent political and economic struggle of financial and oligarchic groups, the influence of foreign, mainly Russian, publishing content and products. The Ukrainian-language periodicals were in a particularly critical state. The economic problems of editorial teams became more and more acute. The quantitative and qualitative indicators of the published issues decreased. The cost of publications was constantly increasing against the background of a decrease in the purchasing power of the population, which did not contribute to an increase in interest in reading.

Today, a characteristic feature is the informatization of all human activity, which requires a constant and careful analysis of the media functioning in view of their role in the informational, scientific, educational, cultural and spiritual provision of society.

Newspapers were always and remain an important component of the information space of the state, a communicator of the government and society, carrying out specific definitions in these relations. The state of such interaction shows the democracy in the country, contributes to the civil society formation, therefore, a historical analysis of the newspaper sphere actual formation and development in Ukraine, clarification of achievements and gaps even under modern conditions of development, is important for the management policy formation both on the part of the state and public self-management.

The study of modern mass media is impossible without an excursion into the past, without clarifying the roots of national media, without determining the cause and effect aspects of various periods of their development. Actually, the research focuses on these issues.

**The Analysis of Recent Research and Publications.** The role of the printed word in the development of independent Ukraine is extremely important. It shapes social and political opinion influences the mentality of the Ukrainian people, their spiritual life and the revival of historical traditions, the economy development. During the period under analysis, the focus of mass media activity fundamentally changed. If during the times of the USSR they were mostly just disseminators of information, nowadays they are active participants in all social and political processes.

Practically all schools and directions of modern humanitarian thought (historians, philosophers, sociologists, psychologists, pedagogues, ethnopsychologists, etc.) in one way or another touch on the functioning of mass media (communication).

The transition to the information society puts forward special requirements for the national information space development, the most sensitive aspect of which is the media business. The studies of domestic scholars are devoted to separate problems of information, information and communication systems of the national information space: V. Zdroveha (Zdroveha, 1995), B. Potiatynyk (Potiatynyk, 1996), I. Krupskyi (Krupskyi, 2007), O. Vakulchuk and L. Dubrovina (Vakulchuk & Dubrovina, 2022), M. Nahornyak (Nahorniak, 1997), I. Mykhailyn (Mykhailyn, 2002), V. Rizun and T. Trachuk (Rizun & Trachuk, 2005), V. Kononenko and O. Melnychuk (Kononenko & Melnychuk, 2019) and the others.

V. Nabrusko did the research on the methods of mass media communication with the audience, distinguishing the main ones: imperative and doctrinal; manipulative, liberal and democratic (Nabrusko, 2009).

There should be mentioned the researchers of modern mass media: M. Tymoshyk (Tymoshyk, 2007), V. Karpenko (Karpenko, 2003), V. Bebyk and O. Sydorenko (Bebyk & Sydorenko, 1996), S. Kostyleva (Kostyleva, 2001), V. Shpak (Shpak, 2015) and the others.

When studying the problems of the national information space, one cannot bypass the language issue, and not only from the point of view of a tool of communication between people or a defining link of national culture, and above all, as a factor of the country's national security.

Ivan Ohienko called a nation that does not have a common literary language an immature nation. The slogan of his magazine "The Native Language" was "for one people – one literary language, one spelling". Transcarpathian Vasiliian Fathers highly valued this publication and prophesied: "One day the eyes of the Ukrainian people will be opened, and they will thank Ohienko for "The Native Language"" (CSHAUL, f. 309, d. 1, c. 1600, p. 18).

Among the most notable researchers in this direction are the following ones: V. Lyzanchuk (Lyzanchuk, 2004), A. Tkachuk (Tkachuk, 2001), M. Mikhnovsky (Mikhnovskyi, 2007), V. Kotsur (Kotsur & Novorodovska, 2022), M. Parakhina (Parakhina, 2014) and the others.

The idea of democratization of the mass media, freedom of speech in the media was studied by Yu. Bondar (Bondar, 2004), Ye. Zakharov (Zakharov, 2001), V. Zdoroveha (Zdoroveha, 1992), V. Lyzanchuk (Lyzanchuk, 1995) and the others.

A special issue is the relationship between the media and the government, in particular of the mass media denationalization. During the study, the following works were analyzed: T. Prystupenko (Prystupenko, 1996), O. Pronchenko (Pronchenko, 2007), I. Krupskyi and P. Fedoryshyn (Krupskyi & Fedoryshyn, 1996), O. Maliarchuk and O. Kogut (Maliarchuk & Kogut 2021) and the others.

M. Nechytaliuk presented the history of Ukrainian journalism (from its birth to the beginning of the 20th century) (Nechytaliuk, 1993). I. Mykhailyn divided the history of the press into 4 periods: the Russian-Ukrainian period, the time from the birth of Ukrainian journalism to the moment of its ban in Russia by the Valuev Circular of 1863; Austrian-Ukrainian or Galician-Ukrainian; three decades of the 20th century; the period of 1930 – 1980 (Mykhailyn, 2000, pp. 20–24).

A more thorough periodization of 14 periods was proposed by M. Romaniuk: from the earliest times to the period of the Ukrainian statehood development (Romaniuk, 2000).

Currently, the most understudied is the modern period of the Ukrainian statehood formation.

**The purpose of the research** is to do the research on the formation and development of national newspapers in 1991 – 2013, the main achievements and gaps during certain periods of development depending on various factors. At the same time, both post-colonial, national and historical factors of the Ukrainian society are taken into account.

**The Results of the Research.** In order to understand the current state and development trends of the Ukrainian newspapers, it is necessary to dwell a little into their history. On the territory of modern Ukraine, the first printed newspapers date back to January 1, 1776, when the French-language weekly "Gazette de Leopold" was published in the Lviv printing house of A. Piller. In six months, the leaflet "Lviv Courier" began to be distributed in Polish. The Ukrainian-language editions count from May 15, 1848 – the day of publication of the newspaper "Zoria Halytska" (Kalakura, Holovko, Voitsekhivska, et al, 2002). The Russian-language publications dominated the rest of the Ukrainian lands. "Kharkovskie Izvestia" began to be published in 1817, where parts of the articles were published in Ukrainian (Smolii, 2005, pp. 612–622).

Linguistic researchers found about two hundred decrees of the Russian rulers that suppressed the Ukrainian language (Khronika, 2012).

Even the revolutionary events of 1905 – 1907 pp. did not change the tsar's attempts to eradicate everything Ukrainian. The secret circular of the Russian Empire, promulgated on January 27, 1907, ordered local postal officials to withdraw all Ukrainian-language publications that were subscribed to by the Ukrainian population (CSHAUK, f. 1439, d. 1, c. 518, p. 21). The planned attack on the Ukrainian-language press intensified during the implementation of a circular banning the publication of publications promoting hostile attitudes towards the government (CSHAUK, f. 295, d. 1, c. 2, p. 46).

For a certain period of time, the Ukrainian periodicals were revived during the restoration of the Ukrainian statehood (1917 – 1920). In 1917, more than 550 newspapers were published in Ukraine (Kalakura, Holovko, Voitsekhivska, et al, 2002).

With the establishment of the Soviet power, the press once again fell under a strict grip of censorship. During the post-war period, newspaper materials necessarily passed the control of the Head Office of the USSR for the Protection of State Secrets (Holovlit of the USSR). In the 1970s in the Ukrainian SSR, the free Ukrainian press was only an underground self-publishing press.

Just a short excursion into the history of native newspaper work shows a difficult path of the struggle for one's identity and, actually, for one's existence as a bearer of the Ukrainian culture and national spirit.

The new page of the Ukrainian press began with the announcement of Gorbachov's perestroika, and in 1990 a real revival of the national media, in particular print media, began. The Law "On the Press and Other Mass Media" adopted on June 21, 1990 announced the abolition of censorship.

During the period of formation and acquisition of independence of Ukraine in 1991, the national mass media became a powerful nation-building institution, laid the fundamental foundations of building a new state in terms of information policy, which, together with socio-economic, foreign-political, military and defense components of national policy form a full-fledged modern state. The millions of copies of the Ukrainian newspapers of that period, the multi-million audience of the Ukrainian radio and television with almost one hundred percent coverage of the air signal of the entire territory of the country became a powerful factor in the formation of public consciousness based on fundamental national and patriotic principles.

The formation of the periodical press of Ukraine in 1991 – 2013 as a component of the post-colonial national media field has distinctive features in the Ukrainian realities, associated with unnatural formative social development, excessive accumulation of capital by individual financial groups and the formation of a correspondingly distorted picture of the information field with distinct oligarchic interests.

Let's look at the statistical indicators of the newspaper sector, for which we will use the data of the Book Chamber of Ukraine (Knyzhkova palata Ukrainy, 2022) and the State Statistics Service of Ukraine (Derzhavna sluzhba statystyky Ukrainy, 2022). In 1991, 1,909 newspaper titles were published in Ukraine. After a slight drop of 148 titles the following year, a non-linear but steady increase in the number of titles began, reaching 3,045 in 2002 (3,014 in 2004). These indicators became the quantitative peak of the Ukrainian journalism, as in the future the number of titles began to decline at first slowly, and then accelerated (2,885 in 2007; 2,347 in 2010), up to 2,270 newspapers in 2013.



Other important indicators of the functioning of printed media are the total annual and average circulation of newspapers. The annual circulation in 1991 was 3,799,971.0 thousand copies. The first years of independence were characterized by a sharp drop in this indicator, up to 1,582,389.8 thousand copies in 1996. The following decade was characterized by a rather rapid growth of printed copies of newspapers (4,235,146.0 thousand copies in 2006). However, in the future, this trend changed to the opposite, and already in 2013, only 3,357,303.5 thousand copies were printed. In many respects, the situation is similar in relation to a general average (one-off) adjustments (27,471.0 thousand copies in 1991; 90,267.0 thousand copies in 2006; 50,723.0 thousand copies in 2013). However, some spikes should be noted, in particular 40,973.6 thousand copies in 1993; 49,495.7 thousand copies in 1998; 86,555.9 thousand copies in 2002; 87,653.6 thousand copies in 2004, which is primarily explained by election campaigns in those years to the country's authorities.

Among the qualitative statistical indicators, it is worth focusing on the produced editions per 1,000 people – residents of Ukraine: in 1991, there were 529 copies. The best indicator in 2006 was 1,937.1 copies, which gradually decreased to 1,113.5 copies in 2013.

Based on the mentioned above statistics, it is possible to draw the first conclusions and follow individual periods and trends of development. The period of 1991 – 1995 is characterized by a certain stability, when quantitative indicators fluctuated within the initial period. The exception is 1993 – the year of the start of the presidential race, when the total average (one-time) circulation of publications almost doubled compared to the previous and following years. The printed press was actively involved in the political struggle. Responding to the needs of society, in 1996 – 2002 there was a steady increase in both the number of titles (1122 new newspapers appeared) and the circulation of publications. In 2003 – 2006 intensification of the political struggle led to a rapid increase in the average single circulation of publications – more than twice compared to the previous peak in 1993. However, already in 2007, the annual total circulation of publications decreased by more than 30%, the process of a progressive reduction of the number of newspapers began, which was caused not so much by a decrease in interest on the part of society, but rather by economic problems of editorial offices. By 2013, the number of newspaper titles had fallen back to the level of 1996, and the total average circulation had almost halved compared to the 2006 peak.

Quantitative indicators can be largely understood by considering the newspaper industry from the point of view of ownership. It is natural that in 1991 all newspapers were controlled by the state, party, trade union or komsomol organs and were actually maintained by them. After gaining independence, the majority of the newspapers changed their faces. Councils of People's Deputies, local self-government organs, state institutions, educational and cultural institutions appeared among the founders. The owners of individual editions became the collectives of editorial offices, independently or jointly with commercial structures. Many mass media ceased to exist. There were also new purely state publications: the newspapers "Uriadovy Kurier" (the organ of the state executive power – 1990), "Voice of Ukraine" (the organ of the Verkhovna Rada of Ukraine – 1991). One of the first business projects was the all-Ukrainian all-political Russian-language newspaper "Kiyevskie vedomosti", which had been published since 1992. Private publications of various topics quickly gained popularity, in particular: newspapers by interests: "Ukrainian Football", "Fazenda", "Dachnyk", "Birzha", "Furniture"; publications for business – "Posriednik", "Law and Business", "Business", "Avizo", "Expres-Obyava"; "yellow" press – "Lel", "Mr + Mrs", "Bulvar", etc. Later, to serve their own interests, financial and industrial groups started their own newspapers:

“Segodnia”, “Fakty ta Komentari”, “Po-kievski”, etc. “Moscow” editions became formally Ukrainian.

The process of formation of the private sector in this field of activity began, but it was not of a mass nature. A kind of growth spurt in the number of newspapers began in 1996, when 365 editions were registered. With variable success, the positive trend continued until 2004. However, the obvious injustice in the financing of publications of different ownership categories began to crystallize. The economic crisis of 2008 – 2009 accelerated the negative processes of decreasing the number of publications.

As we can see, in 1991 – 2013 the formation of the periodical press of Ukraine as a component of the post-colonial national media field has distinctive features in the Ukrainian realities, associated with an unnatural formative social development, excessive accumulation of capital by individual financial groups and correspondingly distorted picture formation of the information field with distinct oligarchic interests.

In 2013, out of 2,270 available newspapers, 70% were non-state. Demands for complete denationalization of the press began to be heard in the early 1990s. The issue periodically escalated, but no real steps were taken. The Orange Revolution made a certain push. The 2005 Program of Activities of the Cabinet of Ministers “Toward the People” provided for the creation of an appropriate legislative framework and a programme for media denationalization. In addition, the Europeans called on the Ukrainian government to take such actions, placing it first in relation to integration processes (Shpak, 2015, p. 200).

However, only after the Revolution of Dignity, on November 24, 2015, the Verkhovna Rada adopted the law “On Reforming State and Communal Printed Media”. Actual denationalization began in 2016.

The ill-conceived state policy of liberalizing mass media activities in 1991 – 2013 led to the strengthening of the Russification process of the media field, the imposition of foreign ideologies, distant from traditions and customs, moral and ethical values of the Ukrainian people. In fact, a number of legislative acts in the information industry, which provide for citizens to receive comprehensive information from various spheres of life, were violated.

In the process of the total offensive of the “Russian peace”, which began practically after the acquisition of independence in the form of the refacing of Moscow newspapers and the addition of Ukrainian markers to mark their legal status in the national information field, our state was helpless in the face of such challenges and threats in the information field. This historical aspect was actually marked by the beginning of the information and semantic war as a precursor to the next armed aggression and an open full-scale Russian-Ukrainian war. The national information space of Ukraine, instead of becoming a guarantee of the political and information stability of the development of the state, the moral and psychological balance of society, a real nation-building factor, turned into a real threat to information sovereignty as a component of national security. A vivid example of the absurdity of reform processes in the information industry was, in particular, the destruction of the military and army press, which looked quite symptomatic on the eve of open Russian aggression.

Another characteristic of the influence on the development of Ukrainian newspapers is the presence of freedom of speech in the country. An attempt to periodize the history of mass media, taking freedom of speech as a basis, shows the following: the period of 1990 – 1996 – a time of confusion, lack of state support, creation of vertical mass media management; the period of 1997 – 2004 – creation of a network of regional publications and newspapers of business structures, total control over the mass media by both the state and the

owners of publications, bribery of state publications, the appearance of “instruction letters”, a real involvement in the political struggle, pressure on the opposition media; 2005 – 2009 – a breath of freedom (in 2007, Ukraine entered the top 100 countries for media freedom for the first time, taking 92nd place and staying there until 2010), the end of “instruction letters”, the time of unfulfilled promises; 2010 – 2013 – the return of censorship, physical attacks on journalists and impunity for criminals (in 2013, Ukraine fell to 126th place out of 179 countries in terms of media freedom) (Reitynh svobody presy, 2021). According to sociological research conducted by the company

According to Research&Vranding Group in 24 oblasts of Ukraine and the Crimea in December of 2010, more than half of the Ukrainians (51%) were convinced that there is a threat to freedom of speech in Ukraine. In their opinion, the objectivity of the presentation of information in the mass media is influenced by the political views of the owner – 53.6%, censorship by the authorities – 38% and self-censorship journalist – 10.6%. (Bilshist ukrainsiv pobachyly, 2010).

The language situation should be singled out as a separate line in the development of the Ukrainian newspapers. In 1991, 66.5 % of newspapers in Ukraine were published in Ukrainian, 32.9 % in Russian, and the rest in other languages of the world. In absolute terms: 1,269 titles were in Ukrainian and 628 titles were in Russian, i.e. almost twice as many newspapers were published in Ukrainian as in Russian. In the future, the situation only worsened. In 2000, the figures were almost equal, the difference was 125 titles or 10%. The patriotic sentiments of the Orange Revolution slightly improved the indicators to the level of 20%, but later the situation stabilized again, and on January 1, 2014, 53% of newspapers were the Ukrainian-language, 36% – the Russian-language, and the rest were published in languages of other nations. The situation is even worse if you look at the editions of publications. In 1991, the total annual circulation of newspapers was: 2,335,388.0 thousand copies – the Ukrainian-speaking and 1,442,596.0 thousand copies – Russian speakers, i.e. the Ukrainian speakers prevailed 1.6 times. The picture changed to the opposite in 1996, when the Russian-language newspapers increased by 1.3 times. The year 2000 became critical, when the dominance of the Russian-language content increased to 2.8 times. In the following years, this indicator fluctuated on the mark around 2 times. At the end of 2013, 66% of newspapers in Ukraine were published in Russian and 30% in Ukrainian. Only the Revolution of Dignity and an epiphany after the barbaric aggression of Russia put an end to this Russian-speaking dominance.

**The Conclusion.** The conducted research makes it possible to conclude that Ukraine is an ancient publishing country, and the history of the development of the Ukrainian newspaper business is inseparable from the history of its people.

The place and role of printed mass media in society during the period under analysis, their quantitative characteristics were different in different time limits. The authors came to a conclusion about the interdependence of quantitative indicators of newspaper production on the state of development of economic institutions, freedom of speech, level of politicization of society, patriotism of state power, and foreign influence.

The period of 1991 – 2013 can be considered the formative years of the Ukrainian newspaper business. This period is characterized by years of stagnation and reformation based on the Soviet legacy (1990 – 1995); a rapid accumulation of potential at the expense of new, mostly private, publications (1996 – 2002); a quantitative saturation of the market, performance in new economic and political realities (2003 – 2007); a gradual loss of potential, economic and political dependency (2008 – 2013).

Gradually, newspapers became components of clan-oligarchic groups that fought for the monopoly on the information space formation in the country.

The inaction of the authorities, civil society and deliberate informational influence on the part of Russia led to the distribution of the Russian-language content in Ukrainian publications, which contributed to fueling collaborators and prepared the ground for aggression.

The analysis of the Ukrainian mass media evolution, their role and place in social processes is a component of the study of the national history of today, an important element of state building.

The lessons of the periodical press free market formation in 1991 – 2013 under the conditions of social relations transformation remain relevant today. These lessons, based on Article 17 of the Constitution of Ukraine, which states that guaranteeing information security is the most important function of the state, require the state authorities to adopt a number of documents that would include, in particular:

- guaranteeing the inviolable principles of freedom of speech, the activity of free media and the impossibility of any financial and political pressure on them;
- taking into account the phenomenon of the Ukrainian mass media, which perform not only informative and cognitive, but also value-oriented, worldview functions under the conditions of transformational social relations;
- understanding the factor of information sovereignty as a real component of national security, the role of national media in informational and semantic wars;
- support of the national mass media working in the educational and cultural field and engaged in the return of historical memory, establishment of the Ukrainian language as the code of the nation, development and dissemination of the ideologue of the Ukrainian world.

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**COMPARATIVE ANALYSIS OF THE CULTURAL POLICY OF LITHUANIA  
AND UKRAINE AT THE END OF THE 20th – BEGINNING OF THE 21st CENTURY**

**Abstract.** *The purpose of the study is to compare the cultural policy strategies of Lithuania and Ukraine after the restoration of their independence at the beginning of the 1990s and to borrow useful experience for the further state building of Ukraine and enrichment of a cultural space of Europe; consideration of the influence of the Soviet past on the culture of both countries and identification of ways to return cultural memory after the restoration of independence by Lithuania and Ukraine; carrying out a comparative analysis of modern strategies of a cultural policy in the countries under analysis. The research methodology is based on general scientific and special historical methods. In particular, on the retrospective and historical genetic method, which made it possible to reveal the influence of the cultural policy of the previous historical period on the formation of new factors that significantly affected the cultural policy of Lithuania and Ukraine after they regained independence. In turn, the comparative analysis made it possible not only to compare the strategies of both countries in the field of a cultural development, but also to trace a number of similar and different policies in this area. The methodological basis of the article is complemented by the principles of historicism, consistency, scientific pluralism, objectivity, systematicity, and comprehensiveness. The Conclusion. In the research it has been elucidated that both Lithuania and Ukraine have a powerful cultural layering, which for a long time was not only hidden under the ideological layering of the Soviet Union, but also underwent a systematic distortion over many years. After the restoration of independence, first of all, prerequisites were created in Lithuania for the revival of traditional (ethnic) culture on general democratic principles, while in Ukraine, in the first decades of independence, there was almost no focus on the restoration of ethnic culture at the national level. Although the experience of Lithuania shows that these steps were extremely necessary for the country, in particular, in order to strengthen the national identity of citizens. No less important for Lithuania and Ukraine is the implementation of a regional cultural policy, especially if we look at this sphere from the point of view of centrifugal tendencies and politicization of regions that occasionally take place in both countries. The approaches to a cultural policy implementation through leading state institutions – the Council of Culture of Lithuania and the Ukrainian Cultural Fund, which place special emphasis on the development of cultural and creative industries, are the most similar in Lithuania and in Ukraine. Analytical data of these institutions testify*

to the strong, albeit somewhat different, potential of both countries in this field. This especially applies to Ukraine, which is one of the largest countries in Europe, both territorially and in terms of a human and intellectual capital. The layer of its culture cannot only significantly enrich the European cultural heritage, but also shows the historical durability and interpenetration of cultures on the European continent over many centuries.

**Key words:** Ukraine, the Republic of Lithuania, Lithuania, strategy, culture, traditions, memory.

## КОМПАРАТИВНИЙ АНАЛІЗ КУЛЬТУРНОЇ ПОЛІТИКИ ЛИТВИ ТА УКРАЇНИ НАПРИКІНЦІ ХХ – ПОЧАТКУ ХХІ ст.

**Анотація.** Мета дослідження полягає у порівнянні стратегій культурної політики Литви та України після відновлення їхньої незалежності на початку 1990-х рр. та запозиченні корисного досвіду для подальшого державного будівництва України й збагачення культурного простору Європи; розгляді впливу радянського минулого на культуру обох країн та виявлення шляхів повернення культурної пам'яті після відновлення Литвою і Україною незалежності; здійсненні компаративного аналізу сучасних стратегій культурної політики в досліджуваних країнах. **Методологія дослідження** спирається на загальнонаукові та спеціальні історичні методи. Зокрема на ретроспективний та історико-генетичний метод, які уможливили виявити вплив культурної політики попереднього історичного періоду на формування нових чинників, які суттєво позначилися на культурній політиці Литви та України після відновлення ними незалежності. Своєю чергою, компаративний аналіз дав змогу не тільки порівняти стратегії обох країн у сфері культурного розвитку, а й відстежити низку схожих та відмінних політик у цій площині. **Методологічну основу статті** доповнюють принципи історизму, послідовності, наукового плюралізму, об'єктивності, системності та всебічності. **Висновки.** Запропоноване дослідження свідчить, що і Литва, і Україна мають потужне культурне нашіарування, яке упродовж тривалого часу було не тільки сховане під ідеологічним нашіаруванням Радянського Союзу, а й зазнавало системного спотворення упродовж багатьох років. Після відновлення незалежності насамперед у Литві були створені передумови для відродження традиційної (етнічної) культури на загальнодемократичних принципах, натомість в Україні, в перші десятиліття незалежності, відновленню етнічної культури на загальнодержавному рівні майже не надавалася увага. Хоча досвід Литви показує, що ці кроки для країни були вкрай необхідні зокрема, для того, щоб зміцнити загальнонаціональну ідентичність громадян. Не менш важливою для Литви та України є реалізація регіональної культурної політики, особливо якщо поглянути на цю сферу під кутом зору відцентрових тенденцій і політизації регіонів, які час від часу мають місце в обох країнах. Найбільш подібними в Литві, і в Україні є підходи до реалізації культурної політики через провідні державні інституції – Раду культури Литви та Український культурний фонд, які особливий акцент роблять на розвиток культурних і креативних індустрій. Аналітичні дані цих установ свідчать про потужний, хоч і децю відмінний потенціал обох країн в цій галузі. Особливо це стосується України, яка є однією з найбільших країн Європи як територіально, так і за показниками людського й інтелектуального капіталу. Пласт її культури може не тільки суттєво збагатити європейську культурну спадщину, а й показати історичну тяглість та взаємопроникнення культур на європейському континенті упродовж багатьох століть.

**Ключові слова:** Україна, Литовська Республіка, Литва, стратегія, культура, традиції, пам'ять.

**The Problem Statement.** Ukraine and the Republic of Lithuania (*hereinafter* – LR or Lithuania) are European countries that are closely connected not only by a rich historical past, but also by the tragic experience of being part of the Soviet totalitarian machine, one of the main tasks of which was to fuse, mix and absorb national cultures. However, despite all their efforts, the Bolsheviks did not manage to achieve final success, because in 1991 the collapse of the Union of Soviet Socialist Republics (*hereinafter* – the USSR) testified that even a

distorted ethnic culture is capable of a gradual reviving and creating a nurturing environment for further state building. Evidence of this is, in particular, the thirty-year experience of a cultural formation in the Republic of Lithuania and Ukraine, because despite the fact that after 1991 the states chose excellent strategies for a cultural development, over time the cultural policies of the states acquired a number of common features, which allow us to show the world that these cultures have a rich potential, which was previously securely hidden behind the ideological superstructure and distorted by the Soviet policy, and nowadays can enrich the European cultural space significantly.

**The Analysis of Sources and Researches.** Despite the fact that many analytical reports are used in the study, it must be said that in both Lithuania and Ukraine, the study of state cultural policy is a chief focus of many scholars who study this phenomenon at the national, regional, and local levels. First of all, certain aspects of the Ukrainian cultural policy were elucidated by Ivan Dziuba (Dziuba, 2009), Yaroslava Muzychenko (Muzychenko, 2020), Yaroslav Kalakura (Kalakura, 2013), Yulia Nikishenko (Nikishenko, 2004), Illia Levchenko (Levchenko, 2022), Mykhailo Tyvodar (Tyvodar, 2004), Hlib Vysheslavskiy (Vysheslavskiy, 2020), Maria Parakhina (Parakhina, 2018), Roman Kharkovenko (Kharkovenko, 2023), Oleh Rishniak (Rishniak, 2022), Inna Paholok, Natalia Hrynokh (Paholok & Hrynokh, 2020) and the others. Among Lithuanian and other foreign researchers, the issue of cultural policy is studied by Petras Kalnius (Kalnius, 2011; Kalnius, 2019), Vladas Sirutavičius (Sirutavičius, 2017), Sumitra Dutta, Bruno Lanvin, Lorena Rivera León and Sasha Wunsch-Vincent (Dutta, Lanvin, Rivera León, Wunsch-Vincent, 2021), Radvilė Maskuliūnaitė, Christina Mažeikaitė (Maskuliūnaitė & Mažeikaitė, 2022). At the same time, none of these researchers attempted to compare the cultural policies of both countries, with the aim of identifying and borrowing useful experience for improving their own cultural strategies.

**The purpose** of the study is to compare the cultural policy strategies of Lithuania and Ukraine after the restoration of their independence at the end of the 20th century, with the aim of using a positive experience for further state building of Ukraine and enrichment of the cultural space of Europe. First of all, it is about considering the influence of the Soviet past on the culture of both countries and identifying ways to restore the cultural memory of both peoples after the restoration of independence; to compare modern strategies of cultural policy in Ukraine and Lithuania, to distinguish their strengths and weaknesses.

**The Results of the Research.** It should be mentioned that Ukraine was part of the USSR for much longer period, so the Ukrainian ethnic culture was under much more destructive influence than the culture of any other country. The Ukrainian traditions, customs and self-expression, which have always been a fertile ground for the growth of national self-awareness of the Ukrainians, constituted a special “danger” for the Soviet totalitarian leadership, to whom the priority was to control the Ukrainian national and cultural sphere (Yefimenko, 2003). As a result, under the conditions of the hybrid policy of planting and establishing the Bolshevik regime in the 20th century, Ukraine experienced a spiritual genocide (Dziuba, 2009), as a result of which the entire layer of cultural heritage suffered irreversible losses – from the looting of unique values, historical monuments, destruction of museums, libraries, ethnic culture, etc. (Kalakura, 2013; Rishniak, 2022; Parakhina, 2018). At the same time, a total russification of the Ukrainian population led to the distortion of the cultural and informational space (Yarmolenko, 2013); marginalization of the sphere of art, with the aim of its unification and stamping mainly propaganda works in the spirit of socialist realism (Levchenko, 2022). In particular, the Bolshevik regime succeeded in denigrating,

pushing out of the mass consciousness and conserving *traditional (ethnic) Ukrainian culture* in the villages: the Bolsheviks skillfully forced people to work on religious holidays, and the ritual ceremonial holidays were held in the Russian manner (for example, Masliana instead of Kolodiy); to abandon the national clothing; through censorship and substitution of meanings, folklore was distorted – songs, fairy tales, visual arts, proverbs, sayings, customs, superstitions, rites, crafts, etc. (Muzychenko, 2020).

Regarding Lithuania, Moscow pursued almost an identical cultural policy. However, in this case, it is worth considering the period and a territorial factor, since Lithuania is a much smaller country in terms of territory and was under the occupation of the USSR for much less period than Ukraine. As a result of these factors, the scale of repression of cultural figures, capable of participating in the struggle for independence, also differed in both countries (Sovietų, 2016).

Since Lithuania was the first to declare independence on March 11, 1990, we suggest that we should consider the experience of cultural policy in Lithuania first. Thus, immediately after the restoration of independence, the revival and strengthening of the ethnic (traditional) culture of the Lithuanians became a criterion of the national identity strengthening. That is why, from the first days of the independence restoration in the Republic of Lithuania, a chief focus was on the restoration and protection of “ethnic culture”. Initially, the reflection of this policy found a place in scientific publications (Kalnius, 2019), and later it was recorded in Law “On Basics of State Protection of Ethnic Culture of the Republic of Lithuania” dated September 29, 1999. In particular, in Law it is stated that “*ethnic culture is a set of cultural values created by the entire people (ethnos), which are passed down from generation to generation and constantly updated, which contributes to the maintenance of national self-awareness and self-awareness, the identity of ethnographic regions*”. Several other important concepts are also recorded in this document: 1) *a living tradition of ethnic culture*, i.e. transmission of the inherited culture of the people, its creation and renewal; 2) *ethnic cultural heritage* – ethnic cultural values created by the nation in the past and preserved to this day. The main goal of this Law is not just to gain knowledge about ethnic culture, but to promote its manifestation in an everyday life of the Lithuanians and to protect against the influence and absorption of mass culture (Lietuvos, 1999). Since 2004, the Council for the Protection of Ethnic Culture has been providing institutional support for this Law under the Seimas (Etninės kultūros globos taryba) (Dėl, 2004) and the Council of Culture of Lithuania (CCL). In addition, the protection of ethnic culture is enshrined in the Law “On the Basics of National Security of the Republic of Lithuania”, which runs that among the objects of national security are the environment and cultural heritage, and “*the duty of the state is to preserve and nurture the identity of national culture, ensure the protection and continuity of the Lithuanian language, patronage of an ethnic culture and local traditions, protection of cultural heritage ...*” (Lietuvos, 1996). In fact, it was the protection of ethnic culture of the Lithuanians that formed the basis of the state cultural policy of the Republic of Lithuania over the past thirty years. Also important is the cultural policy of Lithuania at the regional level and regarding the development of cultural and creative industries (*hereinafter* – CCI). However, these cases require a comparative analysis and will be analysed below.

On August 24, 1991 Ukraine embarked on the path of independence, and it seemed that it also had to get rid of the Soviet vestiges in culture and go the way of restoring ethnic culture. However, as the analysis of the cultural policy of independent Ukraine during the period of 1991 – 2005 showed, due to a negligent attitude towards the cultural sphere on the part of the



state, it found itself in a critical situation (Kotsur, 2023): mass culture, as well as the works of many artists, often resorted to simplification, primitiveness, entertainment, as a result, mainstream and margins developed in Ukraine; in the field of art, the ideological liberalism of the new times combined with cynicism and egoism contrasted with the typical Soviet orientation towards success in Moscow artistic environment and indifference to the Ukrainian culture discourse (Vysheslavskiy, 2020, pp. 116–117); the folk arts were in an even worse situation, which practically fell into decline (Pro skhvalennia, 2021). In fact, at the beginning of the 2000s the state of culture was not so much in the state of decline as it was halfway to dissolution in the newly created Russian cultural product. In 2005 – 2010, the third President of Ukraine, V. Yushchenko, tried to convert the Ukrainians to the national and European origins of the Ukrainian culture by means of relevant decrees. However, the steps initiated by him (policy of memory, restoration of cultural monuments, etc.) ran into the galloping pace of russification of the Ukrainian culture and could not cause a prevailing effect. Although it would be fair to note that in 2005 – 2010 the cultural policy of Ukraine was able to sow the seeds for the revival of cultural authenticity, which could not be completely destroyed by the subsequent unrestrained russification of the cultural space, which culminated in 2010 – 2013.

After the victory of the Revolution of Dignity in 2013 – 2014, positive trends related to the ethno-national motive and European cultural meanings emerged in the formation and development of the Ukrainian cultural policy. This was primarily facilitated by the initiation of the policy of a large-scale decommunization and reforms implementation in the field of culture, which initiated the creation of two powerful institutions such as the Ukrainian Book Institute (2016) and the Ukrainian Cultural Fund (*hereinafter* – UKF) in 2017, the significance of which will be considered below.

Thus, it is evident that the cultural policy of both countries has significant differences. However, if we look deeper into the realm of culture, we will see many similarities. First of all, this concerns the concept of “ethnic culture”. In particular, as in Lithuania, in Ukraine the concept of “ethnic culture” is also represented in a number of scientific and theoretical researches (Nikishenko, 2004; Hurova, 2022). After all, as it was noted by the Ukrainian ethnologist M. Tyvodar, “*ethnic culture is a complex of economic and social life, material and spiritual culture inherited from ancestors, which determine the lifestyle, perform an ethno-identifying role, provide an opportunity to distinguish and contrast oneself with other ethnic groups*” (Tyvodar, 2004, p. 168). However, unlike Lithuania, in Ukraine there is no special legislation aimed at protecting the Ukrainian ethnic culture, since the ethno-cultural policy is regulated by a number of special national and international legal acts and is mainly aimed at protecting the culture of national minorities and indigenous peoples (the Crimean Tatars, the Crimean Karaites, the Krymchaky), whose cultural heritage is more protected than the culture of the Ukrainians (Pro korinni, 2021; Kalakura, 2012; Kontseptsiiia, 2023). At the same time, concepts that are as close as possible to the Lithuanian definitions are contained in the Constitution of Ukraine, the Law of Ukraine “On Folk Art Crafts” (Pro narodni, 2001), Conventions on the Protection of Intangible Cultural Heritage (Konventsiiia, 2008), Law of Ukraine “On Culture” of 2010 (Pro kulturu, 2010), etc. Thus, we see that even in the absence of special legislation, the Ukrainians can also protect their own ethnic cultural heritage, but on the condition that the central body accepts the relevant national and cultural state target programme “Concepts of the State targeted national and cultural programme to ensure the comprehensive development and functioning of the Ukrainian language as the state language in all spheres of public life for the period until 2030” dated May 19, 2021 (Kontseptsiiia,

2021) or “Concept of the State targeted national and cultural programme for the development of folk arts and crafts in 2024 – 2027” dated December 15, 2021, which was updated for the first time since 2007 (Pro skhvalennia, 2021; Pro zatverdzhennia, 2007). However, these steps are not enough, even though there is a strong public demand for the revival of ethnic culture in Ukraine (Tykhonenko, 2020, pp. 405–407).

Summarizing this case, it is worth noting that the state policy regarding ethnic culture in Lithuania is a separate issue, while in Ukraine it is fragmented and apparently even secondary. This is particularly evidenced by the fact that in Lithuania this topic is given much more attention. For example, the analysis of the activities of key and quite similar in their activities institutions, that implement this cultural policy (RKL and UKF) indicates that, despite its modernity, RKL pays much more attention to the development of national and ethnic culture, instead, UKF often prefers projects of cultural innovation and cultural diffusion, which are considered universal cultural mechanisms of co-creation (Proekt, 2023), which can be a serious miscalculation of the state’s internal policy. This is evidenced in particular by the analysis of the work of the UKF in 2018 – 2021, (Richnyi zvit, 2018; Richnyi zvit, 2019; Richnyi zvit, 2020; Richnyi zvit, 2021, p. 20).

Another important direction of the state cultural policy in Lithuania and Ukraine is *the development of culture in the regions*, which at the same time are the largest melting pot and diversity of ethnic culture (Savivaldybių, 2021; Lietuvos, 2006; Kultūros, 2020). In this case, it is rather difficult to make comparisons regarding the ethno-cultural features of the regions, since the area of Ukraine is almost ten times larger than the area of Lithuania, and the conclusions may not be entirely correct. However, in the context of a regional cultural policy there are a number of similar factors that are important for both states.

Firstly, the factor of a decentralized regional cultural policy is inherent in both countries. After all, as is known, in both countries the general policy of decentralization positively changed the policy of financing the cultural sphere. And if these processes are already relatively established in Lithuania, then Ukraine is just beginning the path of a cultural policy decentralization. Therefore, it is natural that a number of obstacles related to the transition process arise in this area (funding procedure, optimization of cultural institutions, provision and access to cultural services, lack of personnel in the OTH, etc.) (Nazarenko, 2021; Yak rozvyvaty, 2020).

Secondly, the Lithuanians systematically monitor the situation and development of a regional culture, with the aim of improving the current cultural policy as a tool for strengthening national identity. This necessity arose due to the difficulties associated with the formation of national identity, both at the level of historical and ethnographic regions, where the issue of ethnic culture is quite politicized (close to the issue of ethnic passports to the Zhemaitians), and in particular in the eastern regions of Lithuania, where a large part of national minorities lives (Kalnius, 2011). After all, it is worth recalling that in 1991 attempts were made to create the Polish political autonomy with the aim of its subsequent exit from the Lithuanian state and joining the Soviet Union. In addition, the Russian and Belarusian national minorities were actively used by Moscow in 1990 with the aim of disrupting independence, because the forceful intervention of the Soviet troops took place precisely under the pretext of protecting the Soviet citizens of non-Lithuanian nationality (Sirutavičius, 2017; Deputato, 1991). Taking into consideration the fact that similar negative manifestations of regionalism and separatism took place and, unfortunately, will occur in Ukraine, the Lithuanian experience is very useful, because the revival of *the Ukrainian* ethnic culture in the regions of Ukraine will help dispel

a number of entrenched myths about the so-called civilizational split of Ukraine. Of course, both Lithuania and Ukraine focus on the development of a cultural diversity and support of the national minorities culture. However, the protection of the Ukrainians' ethnic culture (and indigenous peoples) should be the main priority of the state. As a matter of fact, the first steps towards its implementation have already been taken within the framework of the UKF in this direction of the state cultural policy, in particular, the "Culture. Regions", the most priority task of which is "*promoting preservation, restoration, protection and popularization of the cultural heritage, cultural values and national memory of the Ukrainian people in order to strengthen the modern Ukrainian identity and the formation of common values of a civil society*". The competition "LOT 1. Local Culture" is responsible for the implementation of this priority, the purpose of which is to support regional initiatives and develop culture in small settlements by preserving and promoting local culture, folk crafts. "LOT 2. Culture of indigenous peoples and unique ethnic cultures of the Azov and Black Sea Regions" is responsible for other area. (Ukrainskyi kulturnyi fond, 2023a, 2023b, 2023c). However, currently a serious obstacle is disproportion of participation of regions of Ukraine in competitive programmes aimed at restoring traditional Ukrainian cultural memory. Regionally, Kyiv and the region, Lviv, Kharkiv, Odesa, and Dnipropetrovsk regions are the most actively involved in the submission of cultural support projects (Richnyi zvit, 2018; Richnyi zvit, 2021). Other regions are less active, as a result, these serious disparities negatively affect the revival of ethnic culture in the regions, which can significantly affect the strengthening of the Ukrainian people national identity and enrich the cultural diversity of Europe.

The sphere of *cultural and creative industries* (CCI), which are at the crossroads of art, business and technology, is also important for Lithuania and Ukraine. It is worth paying attention to the fact that in both countries this area of a cultural development is one of the key priorities of state policy relatively recently, or rather after 2015. However, even during this short period of time, CCI established itself as one of the most promising in the field of a cultural policy. The experience of both countries shows that in this area they develop approximately equally. If, for example, we take into account the Global Innovation Index for 2021, we will see that Lithuania ranks the 39th there, and Ukraine – the 49th. Despite the fact that, according to the income rating, Ukraine is included in the group of countries with income below the average, at the same time, it took the third place among the most innovative economies. While Lithuania, which is considered a country with a high income, was ranked at the bottom of the list and did not make it into the top 25 innovative economies (Dutta, Lanvin, Rivera León, Wunsch-Vincent, 2021). However, this does not mean that the potential of CCI in Lithuania is weak, it is just a bit different. In particular, among the main differences in the development of CCI, it is possible to single out the fact that in Lithuania in this field there prevails the development of sites (platforms), computer games, board games, creation of laboratories, exhibition space, creation of advertising services. Film production is less developed (Maskuliūnaitė & Mažeikaitė, 2021). In Ukraine (in 2019), almost half of the added value of CI was created by computer programming (43% of the total VAT of CI), advertising agencies (12%), consulting on informatization (10%), activities in the field of television broadcasting (9%), as well as production of films and video films, television programmes (4%) and mediation in the placement of advertisements in mass media (4%). In addition, exports of cultural and creative industries grew (Nikolaieva, etc., 2020, p. 5). At the same time, it is worth noting that this industry became one of the most vulnerable areas of the Ukrainian economy during the quarantine of 2019 – 2020. For the creative and cultural

industries, 2020 turned out to be a real test of viability and sustainability. The economic crisis caused by the pandemic and quarantine inflicted a severe blow to this sector of the economy, since the majority of the CCI areas are related to social contacts and interaction (Lopukh & Makukha, 2021).

Thus, we can see that, in addition to the revival of ethnic culture, cultural policy regarding regions and cultural creative industries is relevant in both countries. Also, the leading state institutions implementing cultural policy – the Council of Culture of Lithuania and the Ukrainian Cultural Fund – have many similar features, which will continue to be an important object of research.

**The Conclusion.** In the research it has been shown that both Lithuania and Ukraine have a powerful cultural layering, which for a long time was not only hidden under the ideological layering of the Soviet Union, but also underwent systematic distortion over many years. After the restoration of independence, the prerequisites for the revival of traditional (ethnic) culture on general democratic principles were created in Lithuania. While in Ukraine, in the first decades of independence, there was almost no focus on the restoration of ethnic culture at the national level. Although the experience of Lithuania shows that these steps were extremely necessary for the country, in particular, in order to strengthen the national identity of citizens. Equally important for both countries is the implementation of a regional cultural policy, especially if we look at this sphere from the point of view of centrifugal tendencies and politicization of regions that occasionally take place in both countries. The most similar in Lithuania and Ukraine are the approaches to a cultural policy implementation through the leading state institutions – the Council of Culture of Lithuania and the Ukrainian Cultural Fund, which place special emphasis on the development of cultural and creative industries. Analytical data of these institutions testify to the strong, albeit somewhat different, potential of both countries in this field. This especially applies to Ukraine, which is one of the largest countries in Europe both territorially and in terms of a human and intellectual capital. The layer of its culture cannot only significantly enrich the European cultural heritage, but also show the historical durability and interpenetration of cultures on the European continent over many centuries.

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## THE RUSSIAN FACTOR IN THE UKRAINIAN-POLISH RELATIONS ESCALATION AT THE BEGINNING OF THE 20th CENTURY (on the example of damage to monuments at military cemeteries in Poland and Ukraine)

**Abstract.** *The purpose of the research* is to carry out a historical analysis of the place and role of the military historical markers of World War II on the territory of Poland and Ukraine in the Ukrainian-Polish relations of the 2010s, the Russian Federation's information campaigns influence on the interstate and interethnic relations escalation. **The methodology of the research** is based on a complex of general scientific methods and methods of special historical research to identify, describe and explain the reasons for the escalation in the Ukrainian-Polish relations, which was often caused by the commemoration issue. **The scientific novelty** consists in the fact that the author, on the basis of a critical analysis of the Ukrainian historiography and information sources, offered a comprehensive understanding of the prerequisites, course and consequences of a short-term escalation of the Ukrainian-Polish political relations due to the opposite representation of the damage to monuments at military burials during World War II under the influence of the information psychological operations carried out by the Russian Federation and the intervention of “agents” of the Russian influence in Poland and Ukraine. **The Conclusion.** According to the author, there were numerous facts of damage to monuments, especially in the period of 2015 – 2017, at military burials of World War II period, which were primarily crimes that should be condemned, and their perpetrators should be identified and claimed criminal liability. At the same time, the actualization of mutual grievances and insults of the common historical past of the Ukrainian and Polish peoples was actively applied to manipulate and broadcast propaganda by the Russian Federation in the hybrid war strategy implementation. Hence, there is a drastic need for an appropriate assessment regarding the political, public and scientific environments of Ukraine and Poland, which used the topic of damage to monuments at military burials actively for the realization of their own interests and to the detriment of the national interests of both states. The full-fledged war of the Russian Federation against Ukraine on February 22, 2022 actualized the above-mentioned issue, which, under the Russian external intervention, may become a noticeable negative factor in strategic Ukrainian-Polish relations in a short- and medium-term historical perspective.

**Key words:** military burials, hybrid war, Ukrainian-Polish relations, Russia.

## РОСІЙСЬКИЙ ЧИННИК ЩОДО ЕСКАЛАЦІЇ УКРАЇНСЬКО-ПОЛЬСЬКИХ ВІДНОСИН НА ПОЧАТКУ ХХ ст. (НА ПРИКЛАДІ ПОШКОДЖЕННЯ ПАМ'ЯТНИКІВ НА ВІЙСЬКОВИХ ПОХОВАННЯХ У ПОЛЬЩІ ТА УКРАЇНІ)

**Анотація.** Метою роботи є історичний аналіз місця й ролі військово-історичних маркерів доби Другої світової війни на території Польщі та України в українсько-польських відносинах 2010-х рр., вплив інформаційних кампаній Російської Федерації на ескалацію міждержавних і міжнаціональних відносин. **Методологічну базу** дослідження становить комплекс загальнонаукових методів та методів спеціальних історичних досліджень виявлення, опису і пояснення причин ескалації в українсько-польських відносинах, до якої нерідко призводила комемораційна проблема. **Наукова новизна** полягає у тому, що автором на основі критичного аналізу української історіографії та інформаційних джерел запропоновано комплексне розуміння передумов, перебігу та наслідків короткотермінової ескалації українсько-польських політичних відносин через протилежне представлення пошкодження пам'ятників на військових похованнях періоду Другої світової війни під дією інформаційно-психологічних операцій РФ та втручання “агентів” російського впливу в Польщі та Україні.

**У висновках** автор виходить з того, що численні факти пошкодження пам'ятників, особливо в період 2015 – 2017 рр., на військових похованнях періоду Другої світової війни є насамперед злочинами, які мають бути засуджені, а їхні виконавці – встановлені та притягнені до кримінальної відповідальності. Одночасно актуалізація взаємних кривд й образ спільного історичного минулого українського та польського народів активно використовувалася з маніпулятивно-пропагандистською метою російською федерацією у реалізації стратегії гібридної війни. При цьому відповідної оцінки потребують політичні, громадські та наукові середовища України і Польщі, які активно використовували тему пошкодження пам'ятників на військових похованнях для реалізації власних інтересів та на шкоду національним інтересам обох держав. Розгортання 22 лютого 2022 р. широкомасштабної агресії РФ проти України актуалізувало цю проблему, яка, за російського зовнішнього втручання, може стати помітним негативним чинником у стратегічних українсько-польських відносинах на коротко- та середньострокову історичну перспективу.

**Ключові слова:** військові поховання, гібридна війна, українсько-польські відносини, Росія.

**The Problem Statement.** Due to the full-fledged war of the Russian Federation against Ukraine, there is a drastic need to rethink the previous theoretical and methodological approaches and the results of the Ukrainian-Polish relations study in the first decades of the 21st century, based on the need to identify the past destructive Russian influence on their character. There were numerous facts of damage to monuments at military burials in Poland and Ukraine during the period of 2014 – 2017, which became one of the Russian Federation's tools of the hybrid war, both against Ukraine and Poland. The fact that the specified facts were not properly studied, an appropriate legal assessment was not provided, and appropriate information was not presented in the public media space allows the agents of the Russian influence to carry on their activities and be ready for further provocations against the background of the tragic historical experience of World War II period. Such activities can be deployed under special conditions, for example, when there is the growth of “fatigue from the war in Ukraine” in the Republic of Poland and the next elections to the Senate and the Diet (Sejm) are scheduled for the autumn of 2023, which are already being preceded by the growing popularity of the far-right party the “Confederation of Freedom and Independence” (in Polish – Konfederacja Wolność i Niepodległość), whose representatives often speculated and manipulated historical memory, especially Volyn tragedy of 1943.

**The Analysis of Recent Research.** It is important to mention the works, written by the Ukrainian historians I. Patryliak and M. Borovyk when reviewing the works on the issue

under analysis, as the above-mentioned authors covered the Ukrainian Liberation Movement activities during World War II and the Ukrainian-Polish conflict (Patrilyak & Borovyk, 2010). Another scholars, H. Kasianov analysed the historical politics and its conflict-causing potential (Kasianov, 2018), L. Khakhula devoted his work to the issues of modern Ukrainian-Polish relations in the light of difficult pages of common history (Khakhula, 2016), A. Bolianovsky carried out a historiographical study on the confrontation issues between the Ukrainians and the Poles during World War II (Bolianovskiy, 2021).

It is worth highlighting among the Polish historians the works, written by H. Motyka, who is considered to be one of the best scholars of the Ukrainian-Polish confrontation of the mid-1940s of the last century. H. Motyka was criticized by the Ukrainian scholars for the one-sidedness of the research, in particular the adherence to the theory that only the Poles were the victims of the conflict, but Motyka managed to distance himself from the criticism. It should be noted that there is also valuable information about the international relations during the years of events in his works, as well as the conclusions about their influence on the national memory of both peoples (Motyka, 2011; Motyka, 2016).

We should mention the research, conducted by H. Fedoryshchak, in which the author, performed the analysis of the institutional mechanisms of the countries under consideration, in the field of the memory policy implementation, among other conclusions, came to the following conclusions: there is a connection between political interests and the memory policy implementation, and the result such realization can be both cohesion of society against a historical background, and possibility of its disintegration (Fedoryshchak, 2017).

The works of Volyn researchers L. Strilchuk and A. Ninichuk are a thorough study of the historical memory issue and its influence on modern Ukrainian-Polish relations. The above-mentioned authors covered the Ukrainian-Polish conflicts in the field of the so-called “war of memory” and “war of monuments”, highlighted the problems of harmonizing the visions of the countries on common historical events and showed possible ways of the inter-ethnic reconciliation in detail. Despite the fundamental nature of these studies, in their works the authors only briefly mention a destructive influence of the Russian Federation on the process of aggravation of relations between countries due to damage to military and civilian burials (Strilchuk & Ninichuk, 2017; Strilchuk & Ninichuk, 2019; Ninichuk, 2019a; Ninichuk, 2019b).

The Ukrainian scholar V. Hulai, based on his own political and communicative research, substantiated the external side of the political provocation of relations between the studied countries at the modern stage with the tools of a hybrid warfare for the first time (Hulai, 2018). The scholar singled out the most powerful agents of the Russian provocative influence in Poland on the Ukrainian-Polish relations escalation in the last decade for the first time (Hulai, 2017).

The Polish historian R. Drozd presented the methodological remarks on the prerequisites and nature of the use of the military burials issue of World War II period in modern Ukrainian relations several years ago (Drozd, 2020).

The analysis made by O. Nikonorov can serve as an empirical addition to the Russian influence on the Polish political environment (Nikonorov, 2017).

We can consider the article, written by N. Tuziak as a successful example of the use of technologies for working with open data to elucidate historical issues (Tuziak, 2017).

The editors of the renowned Internet resource the “Historical Truth” offered a generalizing historical and political retrospective of one of the plots of attempts to provoke the Ukrainian-Polish relations in the course of Russia’s hybrid aggression against Ukraine (Vandalizm, 2017).



The research, done by Volyn historian O. Kalischuk is valuable from the point of view of the Ukrainian-Polish history interpretation, the stereotypes and mitologems formation (Kalischuk, 2023a; Kalischuk, 2023b).

The analysis of an intercultural interaction in the areas adjacent to the Ukrainian-Polish border caused by, among other things, commemorative factors was carried out by R. Chmelyk and L. Khakhula (Chmelyk & Khakhula, 2022).

Despite a number of works, there is no comprehensive comparative study of the damage to monuments at military cemeteries in Poland and Ukraine in the context of the hybrid warfare strategy implementation by the Russian Federation.

**The purpose of the research** is to carry out a historical analysis of the place and role of the military historical markers of World War II on the territory of Poland and Ukraine in the Ukrainian-Polish relations of the 2010s, the Russian Federation's information campaigns influence.

According to the set purpose, it is vital to solve the following *objectives*:

- to summarize the facts of damage to monuments at military burials during World War II in Poland and Ukraine during the period of 2014 – 2017;
- to substantiate the causes, nature and manifestations of provocations by the Russian “agents of influence” of the Ukrainian-Polish relations using the example of damage to monuments at military burials in Poland and Ukraine during World War II;
- to indicate the threat of the political provocation recurrence in the sphere of the memory policy of the Ukrainian and Polish peoples.

**The methodology of the research** is based on a complex of general scientific methods and methods of special historical research to identify, describe and explain the reasons for the escalation in the Ukrainian-Polish relations of the last decade due to the issue of military burials during World War II.

**The Results of the Research.** In order to understand the beginning of the “conflict of memory”, it should be stated that there were the remarks made by the Polish historian R. Drozd, who, did the research on the issue of commemorating the victims of the Polish-Ukrainian conflict, emphasized the Polish population's attitude towards the burial places of the Ukrainians. In the case of civilian victims of the conflict, the attitude was neutral, i.e. it did not cause objections in society. The reaction to the erection of tombstones for soldiers of the Ukrainian Insurgent Army (the UPA) was quite the opposite. The majority of the Polish society considered the UPA soldiers to be the criminals, who were involved in the murders of their loved ones not only on the territory of modern Ukraine, but also in Poland. That is, the directly opposite attitude of the Ukrainian underground activities by the Ukrainians and the Poles affected the perpetuation of the UPA soldiers (Drozd, 2020, p. 92).

The actual aggravation of the Polish-Ukrainian “war of memories”, which concerns the military burials of World War II soldiers, came after 2014, when Russia, implementing a hybrid strategy of geopolitical revenge against Ukraine, annexed the Autonomous Republic of the Crimea and the city of Sevastopol and established in separate districts of Donetsk and Luhansk regions controlled by quasi-state terrorist organizations, the so-called “Donetsk People's Republic” and “Luhansk People's Republic”. The Republic of Poland support for the state sovereignty restoration and territorial integrity of Ukraine could not suit the Russian Federation. In this context, the following words should be mentioned by the renowned Polish researcher, director of the Institute of Political Studies of the Polish Academy of Sciences, Grzegorz Motyka: “... nothing separates the Poles and the Ukrainians, except for the dispute

over one fragment of history – Volyn crimes”, assuming the possibility of using those events as a benefit to Russia in modern hybrid warfare (Tregub, 2017).

A retrospective analysis of the damage to monuments at military cemeteries in Poland and Ukraine over the past decade should begin with the testimony of the head of the Association of Ukrainians in Poland, Petro Tyma, who mentioned another act of vandalism, in addition to the destruction of burial sites in the villages of Hrushovychi, known at that time, Radruzh, Molodych, Verbytsia, Monastyr, Pikulychi, Lisky, – on October 9, 2015, the representatives of the Ukrainian minority discovered a destroyed monument to the Ukrainians, among whom there were members of the UPA, at the cemetery of the village of Verkhtrata, Liubachiv poviat, Subcarpathian Voivodeship (Na skhodi Polshchi, 2017).

The next similar act took place on March 10, 2016 – unknown people destroyed one of the two slabs of the monument to the UPA soldiers and local residents in the village of Molodychi in the Subcarpathian Voivodeship of Poland, located on the site of the former Greek-Catholic cemetery. According to P. Tyma, the destruction of the monument in Molodychi was not “a joke, but a classical provocation”. “All these acts of vandalism were recorded on video and can be found on the Internet, in particular on the website [novorossia.today](http://novorossia.today), the authors of which were the representatives of the nationalist organization “Obóz Wielkiej Polski”. P. Tyma emphasized the following: “To my mind, these were actions inspired by Russia. All this was done in the interests of Russia, which wanted to make the Poles and the Ukrainians to bicker” (Wandale zniszczyli pomnik, 2016). O. Nikonorov analysed the origins, character and provocative activities of the organization “Obóz Wielkiej Polski” (“The Camp of Greater Poland”) in more detail (Nikonorov, 2017).

Another monument was destroyed in the village of Verkhtrata in Subcarpathian (Podkarpackie) Voivodeship at the beginning of October of 2016. It is about a stone cross on the territory of the Greek Catholic cemetery. It was erected in 1993 and dedicated to the memory of te Ukrainian civilians and the UPA soldiers, who died during World War II and the post-war years. According to the video from Verkhtrata posted on YouTube, it is obvious that the Ukrainian monument is being destroyed during a daylight. Two young men break a stone cross with a jackhammer, and then a pedestal. In the description of the video, it is said that the monument was destroyed by the “patriots” from the “Tykhotemni” (Silent) group. The video was posted online by the Polish pro-Kremlin figure David Gudziec, known for his support of the militants in Donbas (Savytsky, 2016) .

The ultranationalists from the group “Obóz Wielkiej Polski” took responsibility for the attacks on monuments to the soldiers of the Ukrainian Insurgent Army in eastern Poland in November of 2016, based on the publications of some Ukrainian electronic mass media. (Ukraina – Polshcha: viina pamiatnykiv, 2017).

We agree with the opinion of the Polish journalist and researcher of a modern political life of the Russian Federation and the Republic of Belarus Michal Kacewicz: “These were planned actions, which were carried out by the “Obóz Wielkiej Polski” and the nationalists mainly. And it’s not just about cemetery vandalism, insults to the Ukrainians and demonstrations of hatred for the UPA. For the first time, the shameful destruction of tombstones was accompanied not only by the anti-Ukrainian slogans related to Volyn, the UPA and the tragic Polish-Ukrainian history, but also by the slogans related to the war in eastern Ukraine. Thus, they fit perfectly into the propaganda war waged by Moscow. Their aim was to cause a breakdown in the sympathies of the Poles towards Ukraine, which was fighting against the Russian aggression” (Kacewicz, 2016).

The generalized statistics of attacks on burial places of the Ukrainians in Poland were the following: 2014 – 5; 2015 – 6; 2016 – 3; the first half of 2017 – 1. There is the list of damaged or destroyed graves, which includes: a memorial sign to the UPA soldiers (Bialostok tract); a memorial sign commemorating the Ukrainian victims of the communist repression (Verbytsia village); a monument at the mass grave of 13 UPA soldiers (the village of Verkhtrata); a monument to the Ukrainian community of the village (Molodychi village); a memorial sign to the UPA soldiers on Mount Monastyr (near the village of Verkhtraty); a memorial sign commemorating the Ukrainian victims of the communist repression (Radruzh village); a gravestone monument to the UPA soldiers (Hrushovychi village); the graves of the Ukrainian military cemetery (Pykulovychi village) (Ataka, 2017; Za try roky, 2017).

In addition to the actual attacks on the burial places of the Ukrainians in Poland, the provocations often occurred during the events commemorating them. A vivid example of such actions is an annual visit to the Ukrainian military cemetery in Pykulychi near Przemyśl. As a rule, this holiday of the national memory consists of a liturgy in the local UGCC cathedral, a procession from the church to the burial places and a memorial service at the military cemetery. The attacks on the march participants and provocations occurred quite often during the period under study. As the Ukrainian historian M. Lytvyn, a frequent participant in these events, recalls, all the provocateurs were usually the Polish youth, they were dressed in the same T-shirts with the anti-Ukrainian symbols, their actions were planned and synchronized, they obstructed the movement of the convoy, shouted the anti-Ukrainian slogans and tried to get into a fight. M. Lytvyn also emphasized the presence of the Russian journalists: “Our procession moved through the streets of the town from the Cathedral of the UGCC of St. John the Baptist to the cemetery in the village of Pykulychi. When there was the movement of the convoy, a man approached me, who introduced himself as a correspondent of the newspaper “The Krasnaya Zvezda” (publishing house of the armed forces of the Russian Federation – A. Shcheglov). She asked about the purpose of the hike and my assessment of the event. The journalist speaks Russian without an accent and, in my opinion, she knew that the provocations related to Volyn tragedy, the OUN, the UPA had been already planned ...” (Lytvyn, 2023). The very course of the provocations was preserved on the network (Protest, 2017).

In the context of Russia information war against Ukraine and its use of the historical memory of the events of 1943 in Volyn, it is also crucial to mention the unprecedented fact of an appeal in 2013 by the pro-Russian politicians – the people’s deputies of Ukraine at that time with a call to the Polish Diet to recognize the events in Volyn as a genocide. The majority of the so-called “group of 148” were the deputies of the Party of Regions, 25 were the members of the Communist Party of Ukraine, and eight were non-factional deputies. We consider such an act not only an outright subversive activity, but also an incitement of the inter-ethnic enmity. Many of the signatories of the letter are now in the Russian Federation, and some cooperate with the occupiers, such as Volodymyr Saldo and Yevhen Balytsky (Sereda, 2013).

The journalistic intelligence and analytical materials are important for exposing the role of the Russian Federation in attempts to provoke the Ukrainian-Polish relations. Hence, at the beginning of March of 2017, the volunteers of the “InformNapalm” community published part of the analysis of the data obtained by the hackers from the “Ukrainian Cyber Alliance” (UCA) from the mailbox of one of the coordinators of the so-called the “Russian world” in Eastern Europe – Oleksandr Usowski, which provided an evidence, among other things, that the money for the OUN-UPA monuments looting in Poland were given by Russia (InformNapalm, 2017).

At the end of summer – mid-autumn of 2014, there were active anti-Ukrainian actions and actions in the Republic of Poland. Usowski interacted with the members of the right-wing organization the “Camp of Greater Poland” (OWP – Obóz Wielkiej Polski) (more about this organization in the context of the Ukrainian-Polish relations (Nikonorov, 2017)), Mateusz Piskorski’s Samooborona and other middle-level activists. According to the study, it was noted the following: “OWP activist Wojciech Waclaw Wojtulewicz helped Usowski more actively than the others in the fight against the Ukrainian monuments. In August of 2014, they actively communicated with Usowski regarding the action near the monuments to the UPA soldiers in Eastern Poland. In particular, it was about the monument in Khrushchovytsi... It is interesting that the Kremlin pays for such “patriotic” impulses of the Polish right. The price is quite moderate. Such an action with a monument to the UPA and a trip to a rally in Budapest cost the Russian budget only 2,000 dollars (or euros) (InformNapalm, 2017).

In turn, Jan Piekło, a director of the Polish-Ukrainian Foundation for Cooperation PAUSI (in the past, the Ambassador of the Republic of Poland to Ukraine – A. Shcheglov) was convinced that the destruction of the Ukrainian monuments on the territory of Poland was carried out by the hands of the Kremlin’s puppets. Ja. Piekło noted the following: “The fact that information appears on the “Novorossiya” website rapidly, indicates that there is a direct connection between the Russian agents, Russia and the destruction of these Ukrainian UPA monuments on the territory of Poland” (Savytsky, 2015).

According to experts’ forecasts, the “war of monuments” carried on. The next acts of vandalism took place already in Ukraine, in Lviv region. The first provocative attempt to escalate the Ukrainian-Polish relations around the issue of damage to World War II monuments was the looting of the memorial to the Polish residents of the village of Huta Peniatska, which was located on the territory of the modern Pidkaminska community of Lviv region. On January 8, 2017, the memorial tables with the names of the dead were filled with blue and yellow, black and red paints, and the central cross composition was broken into pieces (Dudar, 2017; Lewicki, 2017; Smoleński, 2017; Pomnik Polaków w Hucie Pieniackiej, 2017).

The reaction of the Polish side was prompt and unambiguous. For example, the Consul of the Consulate General of the Republic of Poland in Lviv, the First Counselor of the Consulate Maryan Orlikovskyi visited the damaged memorial in Huta Peniatska on January 10 and later on noted the following: “It is definitely a provocation. It’s hard for me to speak. I do not understand who did it, in what way and why. The relevant services will take care of that. On the other hand, I can express my great satisfaction with the presence of so many people here, especially from Lviv Regional State Administration, which shows that everyone was worried” (Belovolchenko, 2017).

“Their interest and problems with carrying out the provocation indicate unambiguously that the source of all this is Moscow. It is also confirmed by the fact that the Russian mass media were the first to inform about this event,” said the adviser to the head of the Polish Foreign Ministry, Professor Przemysław Zurawski vel Grajewski, in a comment to the Ukrinform agency (Radnyk Vashchykovskoho zaiavliaie, 2017).

He also drew attention to the fact that the video from YouTube was captioned in Ukrainian with the use of Russianisms and emphasized that “during 2015 – 2016, during the destruction of the Ukrainian monuments in Poland, the vandals also left the Polish inscriptions with some mistakes”. According to him, the destruction of the monument at Huta Peniatska cemetery was the proof that “there is an intensive attempt to antagonize the peoples of our region, who are threatened by Russia” (Radnyk Vashchykovskoho zaiavliaie, 2017).

A well-known Polish scholar, Ewa Siemaszko, stated that the Russian provocateurs were involved in the attack on the memorial in Huta Peniatska: “All signs in the sky and on the ground point to the Russian “paws” ...a video of this event appeared on YouTube with the caption that it was made by the “Right Sector”. The “Right Sector” renounced it immediately and declared that it had nothing to do with it. It is interesting that there was a spelling mistake in the mentioned signature indicating the Right Sector, which a Ukrainian would not have made. The above-mentioned mistake indicated a connection with the Russian language. Moreover, Siemaszko said the following: “I learned that the first information about the destruction of the monument appeared on the Russian government portal” Semashko said (Ewa Siemaszko, 2017).

The next stage of the Ukrainian-Polish relations provocation occurred at the beginning of March of 2017, when on March 10, the vandals desecrated a monument to the Polish professors, who died at the hands of the Gestapo in July of 1941 on the Vuletski Hills in Lviv. It was smeared with red paint, and the inscription “death to liakhy” was also painted on it (Lavryshyn, 2017).

On March 12 of the same year, an act of vandalism occurred in the village of Pidkamin, which is not far from the above-mentioned Huta Peniatska cemetery. The commemorative tables with the names of the dead were covered with red paint, the inscription “Death to liakhy” and swastika were written on the cross (Tereshchuk, 2017).

It is worth agreeing with V. Hulai, who claimed that the individual media resources were adding salt to the conflict. Quite often, the Ukrainian and Polish mass media tried to make a sensation out of the above-mentioned provocations on the territory of Ukraine and Poland, which, as a rule, were behind the Russian side (Hulai, 2017, p. 622).

In contrast to this, the results of the journalistic investigation of the Internet resource ZAXID.NET are worthy of special attention, which testify convincingly that the main goal of the unknown vandals was to raise a resonant information wave, and not to damage the memorial (Tuziak, 2017). Next, we will outline the main results of the author’s research:

- for the first time, the information about destruction of the monument in Huta Peniatska appeared in the anti-Ukrainian groups of the “VKontakte” network on the morning of January 9;
- the first message about the desecration of the monument appeared in the group “Russia, Ukraine and Belarus –are the Holy Rus” (10:24 9 січня);
- 1:45 p.m. On January 9, information about this case appears on the Facebook page of former “Inter” TV host and “Antimaidan” host Yuriy Kot. He did not add a photo from the scene, writing only that “Glory to Ukraine” was written on the monument. The post was created long before the publication of the first news on this topic and has already gained greater resonance;
- in particular, Yuriy Kot’s post was shared by the page of Zhovkva district organization “Party of Regions” and followers of Viktor Medvedchuk. In addition to them, several VKontakte users also copied this post.
- one of the first messages among news sites was published at 4:51 p.m. The Russian news agency “NA Kharkiv” published an article with the telling title “What is going to happen! Banderivtsi declared the war on the Poles in Western Ukraine”;
- for the first time, the photos from Huta Peniatska were published on the pro-Russian blog varjag2007su in LiveJournal at 7:35 p.m. varjag2007su himself refers to the Russian agency Regnum, but there the news about the destroyed monument appeared at 20 minutes later than in the LiveJournal post.



– the metadata of the published photos indicate that they were created around 5:30 p.m. (this is the time when the photo was uploaded to the site). It is also interesting that the video from the scene of the incident was uploaded to YouTube at 6:54 p.m., that is, half an hour before it was published on the LiveJournal blog. Apart from the video from Huta Penyatska, there is nothing else on the “Vilna Ukraina” YouTube channel

– already with a reference to the Russian Regnum, information about the destroyed monument went to other sites. The “Correspondent” was one of the first Ukrainian agencies to report this news at 8:51 p.m., which is part of the UMH media holding, which is still owned by the scandalous fugitive businessman Serhiy Kurchenko (Tuziak, 2017).

We agree with V. Hulai’s thesis and state that in both states it was clear to the politicians and experts, who took advantage from it and who was the initiator of the Polish-Ukrainian “monument war”. However, the society saw the photo, formed appropriate associations and demanded a reaction from the politicians (Hulai, 2017, pp. 619–620).

**The Conclusion.** Hence, on the basis of the analysis of historiography and information sources, a new comprehensive understanding was elucidated on the prerequisites, course and consequences of attempts to escalate the Ukrainian-Polish relations through the representation of damage to the monuments at military burials during World War II under the influence of information and psychological operations of the Russian Federation and the intervention of the “agents” of the Russian influence in Poland and Ukraine. There were numerous facts of damage to monuments, especially during the period of 2015 – 2017, at military burials of World War II period, which were primarily crimes that should be condemned, and their perpetrators should be identified and claimed criminal liability. In our opinion, the deployment of the Russian Federation full-scale war against Ukraine on February 22, 2022 removed from the “priority agenda” the above-mentioned issue, which under another Russian external intervention could become a noticeable negative factor in the strategic Ukrainian-Polish relations during the period of resistance to the Russian armed aggression against our state.

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**THEORETICAL AND METHODOLOGICAL PRINCIPLES  
OF STUDYING EVERYDAY HISTORY: CONTEMPORARY  
UKRAINIAN HISTORIOGRAPHIC DISCOURSE**

**Abstract.** *The purpose of the article is to analyse the state of development of the main theoretical and methodological foundations of the history study of an everyday life in modern Ukrainian historiography, to determine their problems and further prospects for analysis. The research methodology is based on the principles of historicism, systematicity, objectivity along with the use of general scientific methods – analysis, synthesis, abstraction and generalization; historiographical – specifically historiographical analysis and synthesis; historical – comparative and historical, chronological and typological. The scientific novelty consists in the fact that the article is the first attempt at historiographical reflection on the theoretical and methodological foundations of the history study of an everyday life in modern Ukrainian historical science. The Conclusion. Over the past decades, in modern Ukrainian historiography, there has been a significant increase in research interest*



in the history of an everyday life and everyday life as a theoretical and methodological concept, which has been formed into a stable scientific direction. This process is evidenced by the scientific work on the history of an everyday life at both factual, theoretical, methodological, and conceptual levels. A whole series of thorough concrete historical, theoretical and methodological studies and source researches have been done. Their characteristic feature is a significant predominance of concrete and historical research papers (both in number and subject matter) over theoretical and methodological (conceptual) studies. Another characteristic feature of research papers is a certain conceptual and categorical, conceptual uncertainty of an everyday history, the vagueness of its boundaries and relationships with other directions of anthropologically oriented history. An important feature of modern historiography on the problem raised is, in addition, national peculiarities regarding the clarification of the subject and methodology of an everyday history, which are determined by the level and state of the general development of national historiography, the presence of scientific traditions and schools, and the degree of general development of society. Despite a considerable number of scientific publications, still not all theoretical and methodological foundations of an everyday history have been solved. In particular, this concerns the definition of the very concept of “everyday”, its object and subject. Even nowadays, these issues are at the stage of formation, having not found their solution either in Western or in modern Ukrainian historiography. In general, the outlined issue is quite complex and requires further research, first of all, it is important to develop tools, systematize approaches, principles and methods of determining one’s own subject field of an everyday life.

**Key words:** everyday history, theoretical and methodological principles of research, the concept of “everyday”, Ukrainian historical science, modern historiographical discourse.

## ТЕОРЕТИКО-МЕТОДОЛОГІЧНІ ЗАСАДИ ДОСЛІДЖЕННЯ ІСТОРІЇ ПОВСЯКДЕННЯ: СУЧАСНИЙ ВІТЧИЗНЯНИЙ ІСТОРІОГРАФІЧНИЙ ДИСКУРС

**Анотація.** *Мета дослідження* полягає в аналізі стану розроблення основних теоретико-методологічних засад дослідження історії повсякдення у сучасній українській історіографії, визначенні їхньої проблематики та подальших перспектив вивчення. **Методологія дослідження** ґрунтується на принципах історизму, системності, об’єктивності поряд із використанням загальнонаукових – аналізу, синтезу, абстрагування та узагальнення; історіографічних – конкретно-історіографічного аналізу та синтезу; історичних – порівняльно-історичного, хронологічного та типологічного. **Наукова новизна** полягає у тому, що стаття є першою спробою історіографічної рефлексії щодо теоретико-методологічних засад дослідження історії повсякдення у сучасній вітчизняній історичній науці. **Висновки.** З’ясовано, що за останні десятиліття в сучасній вітчизняній історіографії відбулося суттєве зростання дослідницького зацікавлення до історії повсякдення і до повсякденності як теоретико-методологічного концепту, яке переросло у сталий науковий напрям. Про це свідчить науковий доробок з історії повсякдення як фактографічного, так і теоретико-методологічного і концептуального рівнів. Підготовлено цілу низку ґрунтовних конкретно-історичних і теоретико-методологічних досліджень й джерелознавчих праць. Встановлено, що їхньою характерною рисою є суттєве переважання конкретно-історичних праць (і за кількістю, і тематикою) над теоретико-методологічними (концептуальними). Ще однією характерною рисою наукових праць є певна понятійно-категоріальна та концептуальна невизначеність історії повсякдення, нечіткість її меж і взаємозв’язків з іншими напрямками антропологічно спрямованої історії. Важливою рисою сучасної історіографії з порушеної проблеми є, крім того, національні особливості щодо з’ясування предмета та методології історії повсякдення, що визначаються рівнем і станом загального розвитку національної історіографії, наявністю наукових традицій та шкіл, ступенем загального розвитку суспільства. Зазначено, що, попри чималу кількість наукових публікацій, ще й досі далеко не всі теоретико-методологічні засади історії повсякдення знайшли розв’язання. Зокрема, це стосується визначення самого поняття “повсякдення”, його об’єкта та предмета. Ці питання й сьогодні перебувають на стадії становлення, не знайшовши свого розв’язання ні в західній, ні в сучасній вітчизняній історіографії. Загалом порушена проблема достатньо складна та потребує дальшого дослідження, насамперед актуальним

*є напрацювання інструментарію, систематизації підходів, принципів і методів визначення власного предметного поля повсякденності.*

**Ключові слова:** історія повсякдення, теоретико-методологічні засади дослідження, поняття “повсякдення”, вітчизняна історична наука, сучасний історіографічний дискурс.

**The Problem Statement.** A significant feature of modern Ukrainian historical science is a significant expansion and enrichment of a problematic circle of historical research. After all, the concepts and approaches that prevailed in the Soviet historiography did not and could not provide answers to many key questions in the history of a social development. Primarily, the absence of answers was caused by the historiographical tradition, which was oriented to the priority of the state in the historical process and did not imply a chief focus on ordinary people. The issue of an average person was elucidated fragmentarily, as it was recognized as insignificant and trivial, therefore it was considered as an appendix to a real story.

In modern Ukrainian historiography, there is a process of a constant search for the newest directions of research, one of which is the history of an everyday life. Scholars have come to understand the need to reflect not only events, processes, phenomena as such and to study the biographies of outstanding figures, but also to study an average person: his/her life style, needs, worries, interests, thoughts, feelings. The study of an everyday life of people contributes to the rethinking of stereotypes, trivial, banal schemes of the history of society, as a result of which a new assessment of what is already known appears. As the famous German historian A. Liudtke claimed, everyday history is “an attempt to understand history as a multi-layered process that is reproduced and primarily transformed by those who are both the objects of history and its subjects” (Liudtke, 1999, p. 99).

Unlike the scholars of previous periods, modern scholars consider the history of an everyday life not in isolation from important events, political, economic, and social factors, but primarily as a sphere that not only reflects the main historical processes, but also directly affects the course of history. The appearance of an everyday history is primarily caused by a new understanding of it, the course of which is determined not only by economic laws, political events, prominent personalities, but also by the unremarkable course of an everyday life of ordinary people.

**The Analysis of Recent Research Papers and Publications.** The issue of an everyday life found a certain reflection in the studies of the imperial period. However, the authors of that time did research on the issue of a daily life, the way of life of the population in a fragmented way, focusing mainly on the description of the privileged classes life.

In the Soviet historiography there are researches on socio-economic processes and issues of a class struggle, that is why, an everyday history did not arouse the interest of scholars.

With the restoration of Ukraine’s independence, there is an increase in scientific interest in the history of an everyday life, in particular, in the theoretical and methodological foundations.

Nowadays, this issue occupies a proper place in the research papers, becoming the study subject of many Ukrainian scholars. In particular, the history of an everyday life as a methodological problem and the historiographical and source-scientific issues of its research were analysed by O. Udod, a well-known Ukrainian scholar (Udod, 2002, 2004, 2010a, 2010b). Theoretical and methodological issues of an everyday life, the meaning of the concepts “everyday life”, “history of an everyday life” were analysed by O. Koliastruk, one of the first female researchers of the history of an everyday life in modern domestic historiography

(Koliastruk, 2008, 2009, 2012). The views of scholars on the history of an everyday life and the theoretical foundations of the history of an everyday life were elucidated by V. Holovko (Holovko, 2007, 2009). M. Zinchuk did research on the history of an everyday life as a new direction in the domestic humanities studies (Zinchuk, 2010). Methodological issues of the history of an everyday life and everyday life as a conceptual category of historical research were highlighted by T. Nahaiko (Nahaiko, 2010, 2012). In modern historiography the definition of the concept of “everyday” was analysed by P. Lesnycha (Lesnycha, 2015). The problem of the definition and subject of the concept of “everyday” was analysed by V. Alkov at the local level (Alkov, 2014).

The research papers of the Ukrainian scholars: V. Alkov (Alkov, 2012), O. Bondarenko (Bondarenko, 2021a, 2021b, 2022), O. Vilshanska (Vilshanska, 2011), V. Ilnytskyi (Ilnytskyi, 2015), V. Ilnytskyi and M. Haliv (Ilnytskyi & Haliv, 2019), V. Ilnytskyi and N. Kantor (Ilnytskyi & Kantor, 2018, 2019), M. Haliv and L. Homych (Haliv & Homych, 2017), O. Koliastruk (Koliastruk, 2010), P. Lesnycha (Lesnycha, 2019), S. Orlyk and V. Orlyk (Orlyk & Orlyk 2019), S. Orlyk and A. Mekheda (Orlyk & Mekheda, 2020), S. Orlyk and V. Pavlenko (Orlyk & Pavlenko, 2023), S. Orlyk, H. Palchevich and M. Orlyk (Orlyk, Palchevich & Orlyk, 2021), O. Shportun and V. Orlyk (Shportun & Orlyk, 2021) focus on the study of an everyday life of the Ukrainian society different strata in certain chronological and regional locations.

The Institute of History of Ukraine of the National Academy of Sciences of Ukraine launched a series of monographs under a general title “From the History of an Everyday Life in Ukraine”. In the first of them – “Essays of an Everyday Life in Soviet Ukraine during the NEP period (1921 – 1928)” there is summarized the history of an everyday life of the Ukrainian society during the period of a new economic policy (*Narysy povsiakdennoho zhyttia*, 2009; 2010). More than a dozen monographs of this series were published over twelve years. Such essays are extremely necessary to expand the palette of generalizing researches of a synthetic nature.

**The purpose** of the article is to analyze the development of the main theoretical and methodological foundations of the study of the history of an everyday life in modern Ukrainian historiography, to determine their problems and further prospects for study.

**The Results of the Research.** An everyday history as a new direction of research into the past is one of the components of a historical and anthropological turn in Western humanitarianism that took place in the 1960s as a result of the collapse of great ideas and the destruction of all old explanatory concepts of the historical process.

A steady scientific interest of Ukrainian scholars in the history of an everyday life can be traced back to 2000. Using the achievements of European and world historiography, domestic scholars outline their own approaches to the general theoretical and methodological foundations of the study of an everyday history.

An everyday history is a complex and multifaceted problem. The level of development of this or that scientific problem, the degree of its solution and the determination of prospects for further scientific research depend on the depth and fundamentality of theoretical, methodological, conceptual foundations and a conceptual categorical apparatus. Because of that, the study of the problem we have declared involves, first of all, the definition of the content and essence of its basic categories.

O. Udod, O. Koliastruk, V. Holovko, T. Zabolotna, T. Nahaiko and the others analysed the general state of research into the theoretical and methodological aspects of an everyday history and its problems.

O. Udod was one of the first to address these issues, noting that in modern Ukrainian historiography, the study of theoretical and methodological problems of an everyday history becomes more and more common and is characterized by the growth of methodological, factographic and source studies levels (Udod, 2010a, pp. 6–7). The relevance of an everyday history, in his opinion, consists in the need to solve two methodological scientific “super objectives”: firstly, to overcome a significant lag behind Ukrainian historical science from foreign ones, and, secondly, to use available experience of our own historiography, in particular, the beginning of the 19th century 20th century in relation to the humanities issue, which nowadays resonates with the methodology of an everyday history (Udod, 2010b, p. 18).

A similar general analysis of the theoretical and methodological foundations of the study of an everyday history is contained in the publications of O. Koliastruk, who singled out the most significant features of its current state. According to the scholar, an everyday history, first of all, became a separate object of a scientific study, overcoming at the same time the complex of inferiority. Secondly, the author considers the history of an everyday life not only as an empirical, but also as theoretical problem, which has its own methodological approaches and appropriate scientific tools for research, which contributes not only to reconstruction, but also to the construction of certain conceptual models within which an everyday life is filled with specific things, situations and events. Thirdly, an everyday history, according to O. Koliastruk, involves “multidisciplinary borrowings in its methodology and tools, putting an end to the “enclave” of a highly specialized history, promoting integration processes in historical science as a whole. In this way, the history of an everyday life provided a chance to overcome the habit of historians to broad theoretical generalizations, in which asynchrony, social contradictions, and heterogeneity of the world picture were eliminated (Koliastruk, 2009, pp. 21–22).

T. Zabolotna formulated the most significant problems faced by modern domestic humanitarianism on the way to the study of the history of an everyday life: the lack of a clear and unambiguous definition of the concept of “an everyday life”, the vagueness of the subject of research, the limitation of methodological tools; skepticism of the older generation of scholars regarding social history; a frequent confusion about the elementary descriptiveness of individual authors, sometimes due to the lack of a suitable source base or due to the insufficient theoretical training of young scholars, etc. (Zabolotna, 2010, pp. 38–39). However, according to the scholar, these difficulties are temporary in nature, since understanding and clear awareness of their causes helps to overcome these difficulties and to use the opportunities of an everyday history to study a multifaceted human existence in different historical eras (Zabolotna, 2010, p. 42).

O. Udod also emphasizes the problems in the study of an everyday history, rightly noting that despite the recognition of an everyday history in Ukraine, the reduction of skepticism about its self-sufficiency and institutional independence, there are still ongoing discussions about the objectivity or non-objectivity and relativism of this new direction of historical research. The controversy continues regarding the sources of the history of an everyday life and its scientific and documentary support. The author explains this situation with a number of reasons: “methodological crisis; lagging behind the development of European scientific and methodological culture; prejudiced attitude towards non-traditional sources (personal origin, oral sources, visual, literary, etc.)” (Udod, 2010a, p. 8).

I. Piatnytskova analyzed scientific publications focused, in her words, on “one of the most promising and relevant directions of modern Ukrainian historical science”, which enables a

comprehensive study of the Ukrainian society at various stages of development, updating such important aspects as the peculiarities of an everyday life and everyday practices, a collective and personal identity, worldview, deviant behaviour and social anomalies. The author came to the correct conclusion that the history of an everyday life, its theoretical and methodological foundations are one of the important directions of scientific research in modern Ukrainian historiography (Piatnytskova, 2017, pp. 78–80).

An important aspect of the theoretical and methodological foundations of an everyday history is the definition of the object and subject of research. Nowadays, the problem of an everyday history is becoming not only popular, but also gaining scientific independence, as it strives for a comprehensive reproduction of history. Historians of an everyday life, like historians in their pure form, outline a human history as the object of their scientific study, although for the latter, event history is key – state, political, diplomatic, class, military, etc., on the other hand, its everyday, secondary details and personal factors are beyond the focus. An everyday history has a distinctly integrative character, which is why its interest includes an everyday life, and the impact of various events on people's everyday life, and private life, and stereotypes, and mentalities, and case studies. O. Udod, for example, claims that the object of an everyday history “is a person himself in his relations with the surrounding world” (Udod, 2004, p. 287). Since various aspects of a human existence are studied, in addition, by other social sciences, an everyday history uses their work and methods, therefore it is a “complex, integral science” that covers the entire multiplicity of people's social relations: economic, political, public, ethnic, cultural, family, legal, etc. (Udod, 2004, p. 287).

O. Koliastruk formulated her vision of the history of an everyday life as an object of a scientific study, pointing out, in particular, the reasons for its problematic nature. Firstly, according to the scholar, the research period of this phenomenon is quite short. Secondly, an everyday life is difficult to formalize, since it does not have permanent institutions and mechanisms of expression. After all, the everyday is a wide range of connections, objects and phenomena, which are extremely difficult to single out and define accordingly. Thirdly, an everyday life does not have stable temporal and spatial characteristics. Fourthly, an everyday life is among the interests of other scientific disciplines, each of which sets different tasks in the study of an everyday life. Fifthly, an analytical process complicates the commonness of an everyday life, the obviousness of its rules and norms for all members of society (Koliastruk, 2010, pp. 10–11).

When considering the issue of the subject of an everyday history, O. Udod emphasized that the constant connections of an everyday sphere of life with the others make it impossible to characterize clear boundaries of the subject of study. In addition, the scholar noted that it is not advisable to strive for certain limits in the field of an everyday research. In his opinion, the subject of an everyday history is “first of all, the process of humanizing an everyday life, the psychologization of an everyday life, the attitude of a person to everyday problems, to the government, the state and society as a whole through the prism of a personal reception of living conditions” (Udod, 2010b, p. 20). The history of an everyday life, emphasizes O. Udod, is quite multifaceted, its subject should not be regulated or limited, as it needs various sources. The scholar warns that scientific works should not be a “collective salt shaker” or a factual collection, it is necessary “to adhere to the classical principles of objectivity, comprehensiveness and historicism in the processing of sources from the history of an everyday life, which will make it possible to achieve the maximum reliability of scientific results and the reliability and validity of conclusions” (Udod, 2010b, p. 34).



A similar position is followed by V. Holovko, claiming that an everyday history does not have clear boundaries and methodological principles. The scholar is convinced that in domestic historiography “an everyday life has not yet emerged as a certain methodological direction of research ... in fact, talk of greater ambitions, complex generalizations, etc., is just beginning” (Holovko, 2007, p. 98).

Analyzing the scientific literature on the history of an everyday life, V. Holovko emphasized that “not only do researchers have great problems with defining the subject of this direction, it is quite difficult for them to outline its boundaries. There is the situation in this case – as many researchers, as many judgments – in the worst understanding of this thesis” (Holovko, 2009, p. 59). Reflecting on historiographic analysis of the history of an everyday life, the scholar singled out the views of researchers regarding the subject and limits of an everyday life, noting that some historians try to expand the limits of an everyday history as much as possible and present it as an alternative to history as such. Some scholars reduce it to microhistory, as a description of unique aspects of the past. The others – only to a certain extent see the unity between everyday history and micro-history. In addition, according to V. Holovko, the problem of the relationship between the history of an everyday life and the history of a private life, the history of an everyday life, the history of the bottom and the history of the lower social classes is unsolved. This inconsistency is further strengthened when the supporters of the mentioned areas try “to form their research identity based on the history of an everyday life” (Holovko, 2009, p. 59).

The subject of an everyday history, according to V. Alkov, “is the life of a person and his self-understanding in a certain chronotope” (Alkov, 2014, p. 100). The researcher notes that in the case of the history of an everyday life, it is not advisable to use the dichotomy “right-wrong”, but it is only necessary to state the variety of approaches to its definition, since in the majority of cases historiography is not even about the definition, but “about its image, which cannot be defined unambiguously and comprehensive” (Alkov, 2014, pp. 100).

An important component of a scientific research is the definition of key concepts, because the conceptual and categorical apparatus of any science must be clear, precise, understandable and devoid of ambiguity, different interpretations, etc. This is especially relevant for the study of socio-historical phenomena and processes. It is because of this that, in the context of the study of the discussed topic, the theoretical and conceptual clarification, definition and understanding of such a basic concept as “an everyday life” is of a prominent importance. Many Ukrainian researchers did research on this problem. After all, the need for a scientific definition of the concept of “an everyday life” caused a wide debate among researchers.

O. Udod, for example, noted that in modern historical science, the process of institutionalization of everyday history in the methodology of history has not yet been completed, therefore “the boundaries of the subject of research continue to be blurred, there is no clarity regarding the delineation of the circle of those sciences that can have interdisciplinary connections with the history of an everyday life” (Udod, 2010b, p. 23). Despite this, the scholar is convinced that the use of such a relevant approach in modern methodology, which is everyday history, will contribute to the faster withdrawal of historical science from the state of a prolonged methodological crisis, will make it possible to “turn history into an interesting, truly humanistic discipline” (Udod, 2004, pp. 289–290).

The absence of a clear definition of the concept of “everyday”, the vagueness of the subject of research, the lack of development of methodological tools, etc. is also pointed out by O. Koliastruk. The scholar claims that there is still no clear definition of an everyday life, as

its subject seems self-evident. That is why, the majority of authors who study the history of an everyday life, without explaining the subject of their research, equate it with “ordinary everyday life, a way / way of life, with what people usually do, with everyday life, with private life, neophilic / non-public sphere of being, etc., i.e. it is about different aspects of a person’s “life world” (Koliastruk, 2009, pp. 8–9). Because of that, O. Koliastruk emphasizes that “one of the problems in the “scientific territory” of everyday life is the definition itself”. An everyday life, the scholar notes, is “life as a whole, all the realities of life, this everyday, natural environment, the actual “now” and “here” existence of a person, which includes the entire spectrum of his personal choices”. It is a man, with his diverse needs and interests, that is the key point in understanding the history and culture of an everyday life (Koliastruk, 2009, p. 8).

The analysis of publications on clarification, definition and understanding of the concept of “an everyday life” allowed T. Nahaiko to come to a fully justified, in our opinion, conclusion that “to find a single concrete definition that would absorb the entire essence of this concept is a too difficult task, if at all possible” (Nahaiko, 2012, p. 9). In addition, in the opinion of the author, an attempt to define the everyday as an exclusively historical, philosophical, sociological or cultural category will certainly face rejection by some representatives of the humanitarian trade. At the same time, the scholar emphasizes, during the study of everyday history, it is important to take into account the whole set of evaluations about it – from abstract to concretely applied, which have a certain methodological validity in various disciplines. For T. Nahaiko, it is obvious that an everyday life as a field of scientific research is seen in different ways. In reality, the subject of everyday history is so limitless that “even the considerable number of attempts at theoretical understanding and presentation of one’s own research visions, which is available today in historiography, appears to be only a positive trend in the understanding of this, by all dimensions global, topic” (Nahaiko, 2012, p. 9). In the end, the author claims that the theoretical postulates and his reasoning are outlined, which are related to an attempt to understand an everyday life as an applied field of historical research, “do not exhaust the stated topic, rather on the contrary, they only call on scholars to try their hand at the training ground of existing interpretations” (Nahaiko, 2012, p. 9).

In general, the same position is followed by V. Alkov, who believes that the most adequate definition of the concept of “an everyday life” at the local level is “a continuous interaction between the subject-spatial environment and the local population, aimed at satisfying material and spiritual needs, reality in the interpretation of direct participants” (Alkov, 2014, p. 100). He disagreed with the opinion of V. Holovko regarding the fact that “in Ukraine, unlike the West, there is still no dialogue about the framework of an everyday life and its definition”, explaining this by the author’s desire to give more significance to his works. In reality, says V. Alkov, “the discussion exists and is a relatively large-scale” (Alkov, 2014, p. 98). In our opinion, there is no controversy in this case, because during the period between the publications of the articles by V. Holovko (2007) and V. Alkov (2014), a substantial layer of publications appeared, in which the authors focused on the definition of the concept of an “everyday” and defining its subject.

T. Zabolotna emphasizes that scholars from different countries and scientific schools have been trying for several decades to clarify the essence and definition of the concept of “an everyday life” and to determine the subject of its research for several decades. These searches, in her opinion, were long-term and controversial, as some scholars restricted an everyday life to the concept of “mode of life” (Zabolotna, 2010, p. 39). However, the researcher emphasizes that, in contrast to an everyday life – a defining category in ethnology, the everyday historian

strives to establish the impact of random events on a private, everyday life and reproduce the diversity of individual reactions to the course of certain political events, analyzing the changing life of a person with his everyday everyday worries, and not isolated elements of material or spiritual culture that were created by this person. Modern domestic researchers of everyday history often equate it with anthropology, social history, new cultural history, microhistory, etc. Therefore, T. Zabolotna quite rightly claims that these modern directions of historical research, although they have certain dissimilarities, are united by their analysis of the microcosm of an average person with all its nuances. What they have in common, according to the scholar, “is the focus on local objects with their reorientation to the social practice of people, the application of interpretive analysis to the phenomena of the past” (Zabolotna, 2010, p. 39).

The issue of history are everyday, according to O. Vilshanska, one of the first domestic researchers of an urban everyday life in Ukraine at the end of the 19th and the beginning of the 20th centuries, contains a whole range of objects, phenomena and connections, which are sometimes difficult to differentiate according to their significance and classify because “the very concept of “an everyday life” is multifaceted and multi-layered, it covers various aspects and different levels of a human life” (Vilshanska, 2010, p. 87).

In modern historiography P. Lesnycha analysed the problem of defining an everyday life, according to whom it is obvious that there is still no unified approach to the definition of this concept. She is convinced that this is exactly what motivates researcher of an everyday life to a creative search and enrichment of domestic and world historiography with qualitatively new studies not only on the methodology of history, but also on historical research in general. The author notes that “the history of an everyday life as a direction of historical science has already firmly established itself in the circle of scientific interests of modern scholars, and in Ukraine a significant number of leading scholars are engaged in the theoretical and methodological development of the specified issue” (Lesnycha, 2015, pp. 155–156). According to P. Lesnycha, there is no universally accepted definition of the concept of “an everyday life” as a subject of a historical study, which is why scholars who do research on the content of this concept “try to generalize the whole set of questions that would reflect the essence of an everyday life of an average person as fully as possible. Common to the majority of theoretical developments is consideration of a mode of life as the basis of an everyday life” (Lesnycha, 2015, p. 155). The researcher conventionally divided all definitions of everydayness into three groups: the everyday as the opposite of festivity; an everyday life as an organic unity of a mode of life and mental attributes; the definition of the everyday through psychological and mental characteristics of a person (Lesnycha, 2015, p. 155).

O. Koliastruk drew attention to the important moment of the conceptual foundations formation of everyday history, emphasizing that the methodological foundations of the everyday studies school in domestic historical science were formed owing to the evolutionary progress of Ukrainian historiography and as a result of scientific contacts with advanced European historical and sociological thought. Therefore, the emergence of this direction should not be interpreted as the result of exporting or, in this process, the catch-up trend of modern Ukrainian historical science (Koliastruk, 2012, p. 6). The researcher connects the growth of scientific interest in history of everyday with a specific feature of the general democratization of Ukrainian society, which “requires the objectification of the subjects of history, the recognition of their active participation not only in the creation of history, but also in its understanding and awareness” (Koliastruk, 2012, p. 8). Since history of everyday, according to the scholar, is intended to demonstrate that the course of history depends not

only on the decisions of politicians, economic laws and the will of those in power, but also on the actions of ordinary people, on their understanding of economic laws, their reactions to political processes, etc. (Koliastruk, 2012, p. 8).

**The Conclusion.** Thus, in Western European historiography the anthropological turn in historical research of the second half of the 20th century caused the emergence of the so-called “new history” – a number of new directions in historical science, the focus centre of which is a person, his life and his inner world. One of these directions, in particular, is everyday history. The issues of everyday history contain a whole range of objects, phenomena, connections, which are sometimes difficult to divide according to their significance and tie into a certain coherent system. After all, the very concept of “an everyday life” is multi-layered and multi-faceted, covering various levels of a human life.

The analysis of the development state of the main theoretical and methodological issues of the history of an everyday life gives grounds for asserting that in recent decades there has been a significant increase in research interest in the history of an everyday life and in an everyday life as a theoretical and methodological concept, which has grown into a stable scientific direction. This growth is evidenced by the scientific papers on the history of an everyday life at both factual, theoretical and methodological, and conceptual levels. A whole series of thorough concrete historical, and theoretical and methodological studies and source studies have been written. The greatest contribution to the theoretical and methodological issues development of the study of the history of an everyday life, the clarification of its conceptual foundations, and the search of a clear definition of the very concept of “an everyday life”, without any doubt, were made by the works of well-known researchers O. Udod and O. Koliastruk. These issues were analysed by V. Holovko, T. Zabolotna, T. Nahaiko, V. Alkov, P. Lesnycha and the others.

It should be noted, that among scientific papers on the history of an everyday life, concrete historical researches (in terms of number and subject matter) significantly predominate over theoretical and methodological (conceptual) researches. Another characteristic feature of scientific papers is a certain conceptual and categorical, and conceptual uncertainty of everyday history, the vagueness of its boundaries and links with other directions of anthropology-oriented history. An important feature of modern historiography of everyday history is, in addition, national peculiarities regarding the clarification of the subject and methodology of everyday history, which are determined by the level and state of the general development of national historiography, the presence of scientific traditions and schools, and the degree of the general development.

However, despite the considerable number of scientific publications in which everyday history is studied during certain historical periods, not all theoretical and methodological foundations of everyday history have been resolved. It concerns, in particular, the definition of the very concept of “everyday”, its object and subject. Therefore, we can say that these issues questions are still at the formative stage, having not found their solution either in Western or in modern Ukrainian historiography.

In general, the issue under discussion is quite complex and requires further research, first of all, the development of scientific tools, systematization of approaches, principles and methods of forming the subject field of an everyday life is urgent.

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## РЕЦЕНЗІЇ / REVIEWS

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### **FEMALE FACES OF THE POLISH KLIO IN A REGIONAL DIMENSION**

**(1945 – 1989) (a peer-review on the monograph: Kolbuszewska J. Kobiety na naukowym Olimpie? Łódzkie adeptki Klio w latach 1945 – 1989**

**[Women on the Way to Scientific Olympus? Lodz Adepts Klio in 1945 – 1989]. Łódź: Wydawnictwo Uniwersytetu Łódzkiego, 2021. 270 s.)**

### **ЖІНОЧІ ОБЛИЧЧЯ ПОЛЬСЬКОЇ КЛІО У РЕГІОНАЛЬНОМУ ВИМІРІ**

**(1945 – 1989) (рецензія на монографію: Kolbuszewska J. Kobiety na naukowym Olimpie? Łódzkie adeptki Klio w latach 1945 –1989 [Women on the scientific**

**Olympus? Lodz adepts Klio in the years 1945 – 1989]. Łódź: Wydawnictwo Uniwersytetu Łódzkiego, 2021. 270 s.)**

Due to the historical science development, during which changes in research paradigms take place, new scientific directions opened up before us more and more. Hence, there should be singled out the studies on women in science, in particular, in history among the “gender studies” focused on women’s issues in general. Lodz University Professor Jolanta Kolbuszewska devoted her another research on the issue of women in the Polish historical

science, as there has been her focus on the outlined issue for a long time. Jo. Kolbuszewska's activity was so fruitful in this direction. For example, as Jo. Kolbuszewska's monograph: "Women on the Way to Scientific Olympus" was heatedly discussed (2020), the author's next research was brought out, which was dedicated to the followers of Klio from the University of Lodz during the period of the Polish People's Republic.

The peer-reviewed monograph is a kind of continuation, an in-depth analysis, an illustration of what was discussed in the monograph "Women on the Way to Scientific Olympus...?". After all, if this monograph was devoted to the Polish women-historians scientific emancipation in general, and was chronologically and territorially extensive, then the one discussed lively nowadays is a more concise (but also deeper, more emotional) presentation of biographies and characteristics regarding scientific and career achievements of the representatives of one historiographical centre during the period of 1945 – 1989.

The heroes of this monograph were three generations of women, who managed to reach the highest career levels: "Reach, – according to the author, to the scientific Olympus" (although in the title of the monograph this phrase was formulated not as a statement, but as an interrogative sentence). There are eight essays about women scholars, who worked at the Institute of History of the University of Lodz: the first Professor Nataliya Gansiorowska-Grabowska (1881 – 1964), a scholar Halyna Evert-Kappesova (1898 – 1985) who specialized in the Byzantine, and the researchers who focused on the history of industry – Grizelda Missalova (1901 – 1978), people's movements – Helena Brodowska-Kubicz (1914 – 2003), historiography – Krystyna Srenowska (1914 – 2013) and Sofia Libyszowska (1918 – 2000), workers' movement – Barbara Varhowska (1929 – 2005), history of emigration – Alina Barszczewska-Krupu (1932 – 2001).

The prosopographic aspects of the female researchers' life were analysed in the monograph: education, scientific interests, career growth, organizational and teaching activities at the University and different levels of scientific institutions. Chief focus was on the scientific achievements of the heroines from the point of view of modern historiography. There was also the "private" history of these women, which was left in the memory of their family members, colleagues, and students. It should be noted that a characteristic feature and, obviously, one of the strongest aspects of all the works of the author, and this one in particular, was a broad depiction of contexts – changes in the political, socio-economic, cultural circumstances of a social life of the period under study.

A review of the monograph source base deserves a special focus. Since this monograph is a study that combines different areas of study, involvement of sources is very specific. In the source base we also come across a classic set of sources from the history of historical science, which is based on the scientific literature in which the works of the heroines themselves have a significant place. The reconstructions of female scholars professional formation are based on significant arrays of archival materials involvement from the University's activities (personal files, reports at various meetings, documents accompanying theses defenses, etc.). It was impossible to do the research without the sources of a personal origin: interviews, conversations and correspondence with employees and friends, graduates and family members of the heroines themselves as the memory of the heroines had a significant place in the research. Owing to the above-mentioned sources, the author managed to create a rather vivid image of these women, an alternative to the "official" one recorded in the anniversary texts, obituaries and posthumous memories. We should also note that due to the chronological and geographic brevity of the research subject, it was possible for Jo. Kolbuszewska to focus

not only on the formal issues of the didactics (the knowledge and skills that the researchers imparted to their students), but also on what values they promoted, their outlook, what kind of emotions were experienced.

The quality and quantity of collected information affected the nature of the story directly, all plots include three components: the issues on life and scientific career of female researchers, their achievements in science (in the context of modern reception), and the memory about them. As Jo. Kolbuszewska was a graduate of the University of Lodz, the story constructed by was influenced by her own experience of communicating with some of her heroines – the representatives of the second and third generations of female historians. The author frankly admitted that “despite the desire to be objective and fair to the historians, I wrote about some people (Krystyna Srenowska, Halyna Evert-Kappesova or Sofia Libyszowska) more colourfully, broadly and emotionally” (p. 10).

It is impossible to ignore another “hero” of Jo. Kolbuszewska’s research – the University of Lodz (in particular, its Institute of History), whose past became the background for presenting the specifics of the development of scientific careers of the female researchers. The author interpreted the University of Lodz as a kind of mirror in which the general phenomena and processes of higher education and scientific policy of the times of the Polish People’s Republic were reflected. The main question, which was formulated by Jo. Kolbuszewska was the question of how much a young, provincial but progressive University (which was also called “red”) could contribute to the scientific emancipation of women? The above-mentioned question also gave rise to a number of the following questions: how favourable was the University environment for the intellectual development, how conscious was the choice for the professional self-realization of this particular institution, what motivation was decisive in their choice? A comparison of defense statistics with data from other universities (for example, such “old” ones as Krakow and Warsaw) allowed the author to state that the atmosphere of the University of Lodz contributed to the scientific growth of women historians.

It was explained by the fact that since the establishment of this institution in 1945, its scientific environment had been open to women. In general, it was typical of “young” universities, since there was a rather acute post-war personnel shortage, which was solved at the expense of women. According to Jo. Kolbuszewska, also the newly established universities were less conservative in terms of gender in science and it was easier for women, who dreamed of a research career to start working there. Women’s emancipation was generally facilitated by state policy in the Polish People’s Republic aimed at overcoming inequality. However, science was considered to be a traditionally male “bastion”, did not pay much attention to the fact that women emancipation in a socialist society had to become a reality in all spheres.

The University turned out to be a place where women were not too hindered from advancing in the service. The consistency of research, dedication to work, contacts with other centres, etc., were promoted at the University traditionally. In addition, the researchers’ personal motivation for the scientific and career self-realization also played a role: “Strong women, capable of fighting for their position and the respect of their colleagues, showed activity in many areas, including those that seemed to be reserved for men” (p. 15). The factor of the individual in history was also present, because Jo. Kolbuszewska interpreted strong positions won by women historians at the University of Lodz as the result of the activities of the founder of the Institute of History, Natalia Gansiorowska-Grabowska. Hence, according to the author, the University in Łódź became a place for women historians where they could



realize their scientific ambitions, put their talent and efforts on the altar of Klio and prove the full right of women to engage in science.

The unique culmination of this monograph was the consideration of the problem of evaluating the scientific achievements of female researchers from Łódź, namely, the question of what new things they brought with their studies to the Polish historiography of the Polish People's Republic. Their scientific interests related to various sub-disciplines: from the history of Byzantium to the history of the peasant and labour movements and historiography, covered a wide range of problems and were so significant that they brought the University of Lodz out the status of "parochial and provincial". After all, owing to them, it turned out "that without ancient traditions, a significant scientific and library base and huge archives, but only owing to diligence, discipline and personal abilities, you can reach the scientific Olympus even if you are a woman, and even if you leave the province" (p. 15).

The end of the study was also clearly distinguished, in which, instead of the usual conclusions, we get a comparative description of the formal achievements in the field of history of employees of the University of Lodz during the Polish People's Republic – 8 women and 28 men. The following information could be found in the tables: data on the gender ratio of University employees, Heads of the Institute of History and the Historical and Philosophical Department, Heads of departments, as well as on the defenses of theses by men and women, and even the periods duration between their doctorates and habilitations. The author drew attention to the issue of scientific specialization of women, who were forced to occupy "niche" disciplines, or those who were just beginning their formation in Poland when summing up. Jo. Kolbuszewska did not avoid issues on the social origin of the political position of women in science, because it also affected career advancement in Sovietized Poland. And, in the end, one of the questions posed by the author concerned the discrepancies between women's and men's ways of "functioning" in science, which was expressed in a greater involvement of women in organizational and didactic work, as a result of which their purely scientific work suffered.

Taking everything into consideration, we should note that the covered study is an example of a successful mixing of genres, where at the junction of the history of historical science, "gender studies" and biographical studies (with elements of prosopographic studies) we observe the emergence of a living history of women in science, full of vivid images and deep analysis. In the case of Jo. Kolbuszewska's monograph, we deal with an interesting example of the application of theoretical ideas to a specific material. The original research model offered by the author, which outlines the topic of the history of women in science as fully as possible and from different perspectives, opens up new horizons of knowledge to us, provokes the emergence of discussions.

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**TO VICTORY – TOGETHER WITH THE CIVILIZED WORLD**

**(a peer review of the monograph: Vidniansky S., Martynov A. Russian-Ukrainian War and International Community: a monograph. Kyiv: Institute of History of Ukraine, NAS of Ukraine, 2023. 264 p.)**

**ДО ПЕРЕМОГИ – РАЗОМ ІЗ ЦИВІЛІЗОВАНИМ СВІТОМ**

**(рецензія на книгу: Віднянський С., Мартинов А. Російсько-українська війна та міжнародне співтовариство: монографія. Київ: Інститут історії України НАН України, 2023. 264 с.)**

After the declaration of independence, confirmed by people's vote in 1991, Ukraine acquired the status of a full-fledged subject of international law, therefore every significant event in the country caused a wide resonance throughout the world. In 2014 Russia occupied the Crimea and started an armed conflict in the east of Ukraine, and on February 24, 2022 – a full-scale invasion of the territory of Ukraine along the entire length of a common border line and from the territory of Belarus, the system of international security, law and order was under threat, to which international community could not help but react. At the same time, the reaction was far from unequivocal: “deep concern about maintaining peace and security in

Ukraine”, which after the Russian invasion, the UN Security Council expressed for the first time only in May of 2022, avoiding the words “war” or “aggression”; unprecedented support for Ukraine from the majority of EU and NATO member states; China’s pro-Russian neutrality; complicity of Belarus in the Russian aggression against Ukraine... That is why, “the analysis of the politics of European, North and South American, Asian and African countries and the attitude of international community in general towards the Russian aggression against Ukraine” is considered particularly relevant by S. Vidnianskyi and A. Martynov – the authors of the monograph “Russian-Ukrainian War and International Community”, which was published by the Institute of History of Ukraine of the National Academy of Sciences of Ukraine in 2023. It is addressed to specialists in international issues and a wide range of readers who are interested in modern international relations, as well as the place and role of Ukraine in their transformation under the conditions of the Russian-Ukrainian war of 2014 – 2023.

In Preface to the monograph, academician Valeriy Smoliiy rightly points out that “this monograph is interesting as a kind of “photographic fixation” of the disposition of the international community – both individual states of the world and their public, as well as influential international organizations – regarding Russia’s war against Ukraine. Its authors did not limit to a simple statement of the facts of resource-military, technological, or humanitarian support of the Ukrainians by Western partners, but tried to show how difficult it is to define countries based on the range of liberal democracies in relation to the Russian-Ukrainian war that began in 2014” (p. 7). Indeed, the monograph is a broad factual and analytical study of the attitude of various states of the world and other international actors to Russia’s war against Ukraine, which demonstrates a radical transformation of the modern system of international relations. These issues determine not only the scientific, but also practical significance of the conducted research, as it contains separate ideas for the improvement and activation of the Ukrainian peace diplomacy in order to strengthen international security and counter Russia’s armed aggression, which is a threat to the entire civilized world. The results interpretation of a sociological research conducted in Ukraine and other countries, as well as the use and interpretation of a large number of normative and legal acts of both international and national level, makes it possible to talk about the interdisciplinary approach of the scholars to the issues under research.

Structurally, the monograph includes Preface, 11 Chapters and Conclusions. Preface contains a number of conceptual provisions that determine the content of the entire study. There is no doubt about the statement that “the armed aggression of the Russian Federation against Ukraine, which began on February 24, 2022, was caused, in addition to the senseless and unrealistic intention of the kremlin leadership to gain revenge and revive the imperial status of Russia after the collapse and disintegration of the USSR, also by a maniacal rejection of the Ukrainian nation and statehood and the European choice of Ukraine, a consistent course of the Ukrainian government towards European and Euro-Atlantic integration, supported by the absolute majority of Ukrainian citizens”. Moreover, the authors rightly consider this aggression to be another stage of Russia’s “hybrid war” against the West, while the latter obviously means the entire civilized world.

According to researchers, Russia’s war against Ukraine in 2014 – 2023 will have global consequences. Indeed, significant changes are already being observed in the world order, among which scholars single out consolidation of the European states and the member states of the North Atlantic Alliance, intensification of NATO’s activities and expansion, weakening of confrontation between the United States and China, complication of the Russian Federation’s

relations with its partners and application of political and economic sanctions to it, etc. It is also true that the attitude of different countries to the Russian-Ukrainian war is ambiguous. Having singled out the groups of states depending on what position they occupy – support Ukraine in its resistance to the Russian aggression, maintain neutrality or support Moscow – scholars, in fact, determine the logic of further research, which seems quite natural. The emphasis of scholars on the issues related to the functioning of the Organization for Security and Cooperation in Europe, the United Nations and the UN Security Council, a systemic nature of which was confirmed by the Russian-Ukrainian war, is also justified. But it is surprising that the authors ignored the activities of the Council of Europe and its institutions aimed at supporting Ukraine, which has been a member of the Council since 1995, in its struggle against the aggressor.

Chapter 1 contains an overview of modern historiographical approaches to war as a socio-historical phenomenon, but the authors also partially resort to a historical retrospective of views on the issues of war and peace, recalling the famous treatise “The Art of War” by the Chinese strategist and philosopher Sun Tzu, a famous monograph “On War” by the German military theorist Karl von Clausewitz and a number of other works. Without the goal of all modern studies analysis of the war, the authors single out those that, in their opinion, make it possible to determine domestic and foreign political reasons for the Russian war against Ukraine; reveal the essence of the global hybrid war from the point of view of Russian aggression against Ukraine; highlight the issues of Euro-Atlantic relations (the researchers focus on the analysis of publications by experts of the German “thought factory” “Science and Policy Foundation” for the period of 2020 – 2023) and the others. Summarizing the conducted review, the researchers came to a well-argued conclusion that currently “in domestic and foreign historiography, there have been general trends in the assessment of Russia’s “hybrid war” against Ukraine, which, after February 24, 2022, turned into a large-scale “conventional” war, which resembles both world wars in brutality and threatens the entire democratic world” (p. 36).

In Chapter 2 of the monograph there is highlighted the policy of the European Union regarding Russia’s war against Ukraine and the attitude of European society and many European leaders, famous intellectuals to this war. It is quite natural that the authors focus on these issues primarily, since it was the European election of Ukraine in 2014 that became one of the factors of Russian aggression. In fact, immediately after its beginning, according to the correct observation by the scholars, the EU showed readiness to provide a moral and political support to Ukraine, which turned into real assistance gradually. Analyzing the dynamics of relations between Ukraine and the EU in 2014 – 2019, the researchers note the achievement of positive changes in the direction of European integration, the culmination of which is called the adoption of the Law of Ukraine “On Amendments to the Constitution of Ukraine (regarding the state’s strategic course towards full membership of Ukraine in the European Union and the North Atlantic Treaty Organization)”, which was welcomed by the leaders of the EU member states (p. 45).

The full-scale invasion of Russia, according to the scholars, prompted the EU to adopt an unprecedented document called “Strategic Security and Defense Compass for the European Union, which protects its citizens, values and interests and contributes to international peace and security”, the implementation of which is programmed by 2030. In particular, it condemned the occupation of the Crimea by the Russian Federation, established the definition of unmotivated and unjust Russian aggression against Ukraine, which confirmed not only

the change of attitude, but also the practical approach of the European Union regarding the consolidation of efforts both in the direction of the introduction of tough economic sanctions against the Russian Federation, as well as the provision of real powerful financial, humanitarian, economic and, what is especially important, military aid to Ukraine.

Therefore, the researchers analyse Ukraine's submission of an official application for the EU accession and a difficult process of its approval, which reached its logical conclusion on June 23, 2022, when the European Council unanimously recognized Ukraine as an official candidate for accession to the European Union. Emphasizing that no other state in the history of the EU has received this status so quickly after applying for membership, the authors of the monograph consider the advantages, which Ukraine received as a result, and the recommendations of the European Commission, which must be implemented in order to maintain the candidate status, noting both positive developments in the implementation of the criteria defined by the EU, and certain problems. There is significant the analysis of objectives which are more difficult than the achievement of the so-called Copenhagen criteria for membership in the EU in 1993, because their solution, according to the authors, requires qualitative social evolution: the achievement of a nationwide consensus on the values of European civilization; ensuring human rights and freedoms, democracy, rule of law; overcoming the backwardness of the national economy. And yet, despite the problems, the scholars express confidence that the future of Ukraine is in the European Union, since "The European Union and the governments and citizens of the member countries carry out large-scale actions to support Ukraine in its struggle against the Russian invaders and its European integration course" (p. 69), that "there is no alternative to the European integration of Ukraine, it is beneficial for both Ukraine and the European Union, all its member states" (p. 74).

In Chapter 3 of the monograph there is analysis the support specifics for Ukraine by individual states (Great Britain, Italy, the Iberian states, Germany, France, the Scandinavian countries). The focus on this issue is obviously dictated by the fact that each of these countries experiences its own internal political, economic and social problems during the entire period of Russian aggression, which undoubtedly affect the "operational, strategic and functional capabilities of their national foreign policy" (p. 85). Thus, the researchers recognize Great Britain as "the most consistent ally of Ukraine" (p. 90), in Germany "the idea of supporting Ukraine remains relatively stable" (p. 95), instead, "in France there is no political party that would openly and consistently defend the course of providing aid to Ukraine until victory over Putin's Russian Federation" (p. 102). It should be noted that the scholars' considerations are confirmed by a large number of facts.

In Chapter 4 there is characterized the position of the EU member states neighbouring Ukraine regarding the Russian-Ukrainian war. Despite the disputes between Ukraine and Poland regarding their common tragic history, the authors prove that Poland "took a clear and unambiguous position regarding the Russian-Ukrainian war of 2014 – 2022: resolutely condemned the aggression of the Russian Federation and showed complete solidarity with Ukraine, supported all sanctions imposed by the international community against Russia and became one of Ukraine's closest allies" (pp. 109–116). And, on the contrary, the scholars consider the position of Hungary to be ambiguous, the policy of the Hungarian government towards Ukraine and the Russian-Ukrainian war is called counter-productive (p. 125), at the same time, they hope for favourable changes in the attitudes of Hungarian society for Ukraine. Therefore, the authors name a wide list of manifestations of support and assistance to Ukraine from the side of Romania and express quite realistic expectations, that "in peacetime, and



especially in the context of the negotiation process of Ukraine's accession to the European Union ... with the mediation of Brussels, Kyiv and Bucharest will be able to resolve all problematic aspects of bilateral relations" (p. 134). The researchers did not ignore an active support of Ukraine by the Slovak Republic (apart from political forces that are supporters of national egoism, mistrust of integration associations, which significantly influence public opinion as well); the scholars noted that the Czech Republic helps Ukraine as much as possible, allocating it, in particular, significant funds for military and humanitarian needs.

The support and assistance of the Baltic countries to Ukraine in its resistance to Russian aggression versus the "neutral" policy of Austria, Switzerland, Belarus, Bulgaria, Serbia, the Caucasian and Central Asian countries is highlighted in Chapter 5. The authors quite rightly believe that "the position of the Baltic states – Estonia, Latvia, Lithuania – regarding the Russian-Ukrainian war is determined by their historical experience of coexistence with the aggressive Russian empire in its various guises" (p. 148), which is confirmed by the actions of the official authorities of these states and the facts of the solidarity of their peoples with the people of Ukraine. As for those states that are formally considered neutral, the situation is not so unambiguous. Thus, according to the scholars, Austria balances its interests and European values (p. 153), Switzerland emphasizes its neutral status, provides financial assistance to Ukraine, but refuses to supply weapons (p. 154).

Continuing to highlight the policy of "neutral" states, the researchers come to the conclusion that deep internal political problems do not allow Bulgaria to make a clear decision regarding the condemnation of Russian aggression against Ukraine (p. 160), and condition Serbia's "hybrid neutral" policy (p. 162), make the neutrality of Azerbaijan, Armenia, and Georgia pro-Russian (pp. 163–166) and encourage Kazakhstan to balance between China and the Russian Federation (p. 168), Kyrgyzstan to support Russian military aggression actually (p. 169), and Turkmenistan to limit its foreign policy activity (p. 170).

It is worth noting that within the same chapter, the authors analyse the position of Belarus as a "neutral" state, which does not seem entirely logical, since Belarus participates in Russian aggression against Ukraine.

The policy of the USA and Canada regarding Russia's war against Ukraine is the subject of analysis in Chapter 6. At the same time, the authors note the activation of the US policy in this area: if in 2014 the administration of the US President B. Obama refused to supply weapons to Ukraine, during the period of 2017 – 2019, the administration of D. Trump agreed for the first time to transfer Javelin anti-tank systems to Ukraine under the condition of their storage, and in May of 2022, the US President J. Biden signed the law on military lend-lease for Ukraine, which entered into force on October 1 of the same year. In general, the researchers summarize that "in the US, there is a two-party consensus on preventing the success of Russian efforts aimed at revising borders in Europe forcibly. However, this cannot be said about the consensus regarding the expediency of the final victory over the Russian Federation with its subsequent disintegration and collapse" (p. 177). According to the scholars, Canada's position is vivid, which has supported Ukraine since the declaration of its independence. The reasoning of the researchers that "a significant role in the support of the USA and Canada to Ukraine is played by the numerous and active Ukrainian diaspora in these countries" (p. 179) is absolutely correct.

In Chapter 7 of the monograph, the researchers again raise the issue of the "neutral" position of individual states, this time Moldova and Turkey, Arab countries and Israel, regarding Russian aggression against Ukraine. In our opinion, it makes sense to combine this

chapter with Chapter 5, since both highlight the features of the neutrality of various states, which is determined by internal political processes. Noting a certain support of Ukraine by Moldova, reflecting on the maneuvering of Turkey and Israel in matters related to assistance to Ukraine, the researchers, however, ignore the position of the Arab countries, although this is announced in the title of the chapter.

The subject of research in Chapter 8 is the attitude to the Russian-Ukrainian war of states that, according to the scholars, occupy a position between “neutrality” and collaboration. Among such countries are China, India, Japan, Iran, Argentina, Brazil, and the North African Republic. In addition to the idea about the possibility of reformatting the chapters, expressed above, we have doubts about whether Japan belongs to this group of states, since, according to the authors themselves, “Japan was one of the few Asian countries that openly and consistently supported Ukraine” (p. 207). Other considerations, for example, about the position of China, which “in the Russian-Ukrainian war, pursues a traditional policy of Chinese interests exclusively” (p. 198) or Iran as “a direct ally of the Russian Federation” (p. 207) seem to be fully justified.

North Atlantic military aid to Ukraine (Chapter 9), in our opinion, is not fully covered. The authors once again emphasize the help of the USA and the EU in Ukraine’s resistance to the Russian aggressor, noting their consolidation “for the sake of protecting the values of democracy” (p. 221), instead it was worth at least mentioning the activity of the Ukraine-NATO Commission during the period of the Russian-Ukrainian war .

Chapter 10 entitled “The OSCE Crisis and New Horizons of the European Security System” contains a general description of the creation process and activities of the Organization for Security and Cooperation in Europe, at the same time, the scholars’ conclusions are sometimes contradictory: “the authority and real influence of the OSCE on international affairs was levelled off”, and further: “despite certain imperfections, the OSCE remains the only proven mechanism of multilateral diplomacy in the recent history of international relations, the efforts of which are aimed at strengthening peace and stability” (p. 224). The researchers consider the Black Sea Economic Cooperation Organization and the Central European Initiative to be new and promising elements of the European security mechanism.

In Chapter 11, the scholars raise the effectiveness issue of the United Nations and its most influential body, the Security Council. The researchers note that “at the initiative of Ukraine, the world community within the framework of the UN repeatedly discussed the issue of Russian aggression against Ukraine and adopted a number of important protective documents, although voting for them demonstrated an ambiguous attitude of its member states to the Russian-Ukrainian war of 2014 – 2023 (p. 232) and the authors emphasize that “systematically the Russian Federation blocks all decisions of the UN Security Council concerning its aggressive actions in Ukraine” (p. 233). Indeed, this indicates the low effectiveness of traditional mechanisms for maintaining a global stability both at the level of the UN and other international organizations and creates the need for their transformation in accordance with the challenges of today. The researchers analyse the success important for Ukraine on the diplomatic front and predict that they open “prospects for the post-war arrangement of the system in Europe and the world with an active participation of Ukraine” (p. 149), which should be agreed to.

In the Conclusions, the authors once again emphasize the key issues of their research and confirm that the democratic world, consolidated by the idea of Ukraine’s victory in the fight against the Russian aggressor, provides our country with a military, technical, financial,

humanitarian assistance, a moral and political support, although there are also supporters of appeasement of aggressor at the cost of Ukraine's survival. However, according to the researchers' conviction, which we fully share, "there can be no compromise between these positions" (p. 262).

Summing up, it should be noted that the authors collected, processed and systematized an extremely large amount of information about the attitude of various states of the world and intergovernmental organizations to the Russian aggression against the Ukrainian state, about the reflections on the Russian-Ukrainian war of famous politicians and intellectuals, and used different sources. The final result looks multidimensional, in some sense eclectic, in some places the information is repeated. In general, the monograph meets the requirements of the scientific style of the modern Ukrainian language, however, there are elements of artistic, journalistic, and even conversational styles that are characterized by openly expressed emotionality, imagery, and the use of idioms (brutal Russian aggression; brutal "hot" war against Ukraine; brutal invasion; the kremlin dwarf; the kremlin Führer; the war issue has become almost a litmus test for the Hungarian government and society; Austria is trying to sit on two chairs – to be part of the European Union and not to burn bridges with the Russian Federation; post-imperial phantom pains of Serbian national consciousness; "honeymoon" in the relations of the European Union with the new American administration; hypothetical prospects of autonomous sailing in the stormy waters of international politics; Venice Commission, etc.

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## NOTES

НАУКОВЕ ВИДАННЯ

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