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**IN A FRIENDLY CIRCLE: (IN)FORMAL ASSOCIATIONS AND SOCIETIES  
AND DEVELOPMENT OF SPECIAL (AUXILIARY) HISTORICAL DISCIPLINES  
IN LVIV IN THE SECOND HALF OF THE 19th – 20th CENTURIES**

**Abstract.** *The purpose of the research is to study the formation peculiarities and functioning of the scholars' environment who conducted lectures on special (auxiliary) historical disciplines in Lviv in the second half of the 19th and 20th centuries. The scientific novelty consists in the fact that information on the activity of scientific and public societies of Lviv, related to the development of special (auxiliary) historical disciplines, has been systematized and analyzed comprehensively, and patterns of their development have been elucidated for the first time. The Methodology of the Research.*



General scientific methods of empirical research, theoretical research, methods of historiographical analysis have been applied. **The Conclusions.** Despite a long tradition of teaching special (auxiliary) historical disciplines in Lviv, the activities of the renowned Ukrainian and Polish scholars led to the establishment of the first professional societies at the beginning of the 20th century. The Heraldic Society was organized in the city, and an informal group of local members of Kraków Numismatic and Archaeological Society functioned at the time. The activities of these associations proved the overcoming of a certain atomization in this environment, transition to more organized forms of activity, involvement of not only professional historians, but also amateurs. When Lviv branch of the Polish Heraldic Society operated in the city, and the Union of Lviv Numismatists was founded, the traditions of such work carried on during the interwar period. The result of their work was the growth of interest in Numismatics, Heraldry, Sphragistics and Genealogy, the emergence of publications on the pages of the local periodicals, and the publication of new professional journals. There was a certain, noticeable decline in the activity of such professional associations in the 1930s, due to financial issues, activity of a number of other professional historical associations in the city, and a narrow national character of their composition. The experience of these societies, as well as T. Shevchenko Scientific Society, was shared during the organization of the Theoretical Seminar on Source Studies and Special (Auxiliary) Historical Disciplines in 1961, which operated for two decades at the Historical Archive in Lviv. The Theoretical Seminar not only became a continuation of those formal and informal associations of scholars, who worked in the city until September of 1939, but also formed a new generation of the Ukrainian professionals in special (auxiliary) historical disciplines.

**Key words:** special (auxiliary) historical disciplines, Heraldic Society, Union of Lviv Numismatists, Theoretical Seminar on Source Studies and Special (Auxiliary) Historical Disciplines.

## **У ДРУЖНЬОМУ КОЛІ: (НЕ)ФОРМАЛЬНІ ОБ'ЄДНАННЯ ТА ТОВАРИСТВА І РОЗВИТОК СПЕЦІАЛЬНИХ (ДОПОМІЖНИХ) ІСТОРИЧНИХ ДИСЦИПЛІН У ЛЬВОВІ ДРУГОЇ ПОЛОВИНИ XIX – XX ст.**

**Анотація. Мета дослідження:** вивчити особливості формування та функціонування середовища дослідників спеціальних (допоміжних) історичних дисциплін у Львові другої половини XIX – XX ст. **Наукова новизна:** вперше комплексно систематизовано і проаналізовано відомості про діяльність наукових та громадських товариств Львова, пов'язаних із розвитком спеціальних (допоміжних) історичних дисциплін, виявлено закономірності їхнього розвитку. **Методологія.** Використано загальнонаукові методи емпіричного дослідження, теоретичного дослідження, історіографічного аналізу. **Висновки.** Попри давні традиції викладання спеціальних (допоміжних) історичних дисциплін у Львові, діяльність відомих українських та польських вчених – до створення перших фахових організаційних форм цих дисциплін дійшло на початку XX ст. Тоді у місті було організовано Геральдичне товариство, діяв неформальний гурток місцевих членів краківського Нумізматично-археологічного товариства. Діяльність цих об'єднань засвідчила подолання певної атомізації у цьому середовищі, перехід до організованіших форм діяльності, залучення до роботи не лише фахових істориків, але й аматорів. Традиції такої роботи було продовжено у міжвоєнний період, коли у місті діяло Львівське відділення Польського геральдичного товариства, започатковано Спілку львівських нумізматів. Результатом їхньої праці було зростання інтересу до нумізматички, геральдики, сфрагістики та генеалогії, поява публікацій на сторінках місцевої періодики, видання нових фахових часописів. У 1930-х рр. помітним є певне затихання діяльності таких професійних об'єднань, причинами чого були фінансові негаразди, діяльність у місті низки інших професійних історичних об'єднань, вузьконаціональний характер їхнього складу. Досвід діяльності цих товариств, а також Наукового товариства імені Шевченка, було запозичено при організації у 1961 р. Теоретичного семінару з джерелознавства та спеціальних (допоміжних) історичних дисциплін, що діяв упродовж двох десятиліть років при Історичному архіві у Львові. Теоретичний семінар не лише став продовжувачем тих формальних та неформальних об'єднань дослідників, котрі працювали у місті до вересня 1939 р., а й сформував нове покоління українських фахівців зі спеціальних (допоміжних) історичних дисциплін.

**Ключові слова:** спеціальні (допоміжні) історичні дисципліни, Геральдичне товариство, Спілка львівських нумізматів, Теоретичний семінар з джерелознавства та спеціальних (допоміжних) історичних дисциплін.

**The Problem Statement.** The history of special (auxiliary) historical disciplines in Lviv covers several centuries. It doesn't matter what kind of event we consider to be as a point of reference – the establishment of the first Department of Auxiliary Historical Sciences in Ukraine (1784) at the University, or earlier events, for example, the publication of the genealogical and heraldic directory “Korona Polska” by Kasper Niesiecki (1728 – 1743) in the city, observing the entire further development of these disciplines, it is noticeable that it was not of the nature of a steady linear growth. On the contrary, periods of a certain lull (we consider it inappropriate to use the word decline regarding this phenomenon) ended with an explosive increase in interest. There were several such waves, which is quite easy to date for Lviv: the middle of the 19th century, the end of the 19th – the beginning of the 20th century, the 1960s – 1970s, the eve and the first decade of the restoration of Ukraine's independence. Diverse scientific, educational, cultural, political, and personal factors became the trigger: a surge of interest in the past during the days of modern nations formation or the search of arguments in the inter- and intra-national confrontation, the measures taken by the state, the public, or individual patrons to form the libraries, the museums, the collections of seals or medals, an understanding of the need to instrumentalize professional skills of historians, ultimately – the trend of collecting certain monuments and objects.

The above-mentioned factors, either independently or in totality, led to the activation of efforts in the field of special (auxiliary) historical disciplines and a surplus of people, who showed their involvement in this through professional (including scientific and educational) activities, or through amateur interest, what we would call a *hobby* nowadays. Significance of Franciszek Ksawery Liske, Ivan Krypiakievych or Yaroslav Dashkevych, is indisputable, who contributed to the formation of special (auxiliary) historical disciplines in Lviv. However, there were other professional researchers or amateurs, who were under their influence, or were interested in the disciplines of the given complex independently next to them – in closer or further orbits. Although it did not always happen. A certain atomization was a common phenomenon in this environment, due to the lack of coordinating centres or objective conditions for their formation but not the lack of appropriate leaders. In the article we will try to trace the associations activities that contributed to the development of special (auxiliary) historical disciplines in Lviv in the 19th and 20th centuries and indicate how they contributed to the study of these disciplines in the city, formed appropriate professional environments capable of self-reproduction and autonomous progress.

**The Review of Recent Researches and Publications.** Interest in the history of special (auxiliary) historical disciplines in Lviv is growing over the past three decades. If for a long time information on this issue could be found in the works of W. Semkowicz (Semkowicz, 1937), V. Havrylenko (Havrylenko, 1977), Ya. Kis' (Kis', 1963), Ya. Isaievych (Isaievych, 1963), the number of publications is counted in dozens nowadays. Lviv University scholars' educational and scientific activity became the research subject of some scholars (Szymański, 1991; Shust & Tseluiko, 2008; Ilkiv-Svydnytskyi, 2015; Ciara, 2016; Ławrecki & Szust, 2016; Tseluiko, 2022; Telvak, 2023). The others studied the achievements of Lviv scholars in the fields of Numismatics, Genealogy, and Historical Geography (Korolko, 2002; Szust, 2002; Tseluiko, 2015b; Trubchaninov, 2016). Both domestic and foreign scholars focused on the activities of scientific societies and associations in Lviv recently. These societies contributed to the development of various disciplines in the city greatly. The examples of such societies include the Heraldic Society (1906 – 1939) and the Theoretical Seminar on Archival Studies and Special Historical Disciplines, which operated during the period of the 1960s – 1970s at

the local historical archive (Pudłowski, 1993; Bezdrabko, 2009; Masyk, 2009a; Tseluiko, 2015a; Moroz, 2017). The publications written by V. Perkun focused on the significance of studying the history of special (auxiliary) historical disciplines development (Perkun, 2021a; Perkun, 2021b). The intellectual space of Lviv and local historians' activities are also studied gradually (Telvak, Telvak & Yanyshyn, 2023). However, there is no comprehensive research that would review the history of special (auxiliary) historical disciplines in Lviv. The Ukrainian associations activity, including during the Soviet era and after the restoration of independence, requires further study.

**The purpose of the research** is to study the formation peculiarities and functioning of the scholars' environment who conducted lectures on special (auxiliary) historical disciplines in Lviv in the second half of the 19th and 20th centuries.

**The Results of the Research.** Despite the long-term conducting lessons on Diplomatic, Heraldry and Numismatics at Lviv University (at the end of the 18th and at the first half of the 19th centuries), the number of their researchers or the number of relevant works did not increase. It should be noted as one odd thing that Denys Zubrytskyi was a Ukrainian historian, who contributed to the development of these disciplines in Lviv in the second quarter – the middle of the 19th century, did not obtain a university education diploma and did not attend relevant lectures. There were several reasons for this, and perhaps the main one was a scholastic nature of education at the time, concentration of higher schools work on the training of civil servants rather than scholars, the lack of a constant contact between a teacher and students as a scientific supervisor and his students. Taking into account the above-mentioned, it is difficult to dwell on the scientific schools formation before the educational process reform in the second half of the 19th century.

The museums and archives as well as other cultural institutions operating in the city at the time, did not become the centres of organization of a relevant scientific movement. The above-mentioned institutions accumulated significant documentary funds, old prints and manuscripts, numismatic and sphragistic monuments, which created a good basis for the relevant studies. But the staff of these institutions was insignificant, and people who worked there did not have a proper training. A vivid example is the case of the Polish historian August Bielowski, who was hired for arrangement and inventory manuscript collections in the 1840s by the leadership of Ossolinski National Institute (hereinafter referred to as the Ossolineum). There were the following difficulties, i.e. the lack of training in the auxiliary historical disciplines, and the situation was saved by A. Bielowski's natural abilities and hard work (Semkowicz, 1936, p. 58). The scribes, who worked in the middle of the 19th century did not have the skills to read ancient documents and were "*completely unfamiliar*" with paleography in the so-called the Bernardine archive, the place where the main part of the act books and documents deposited in Lviv were stored (Pietruski & Tatomir, 1870, p. XX).

The atomization was also observed among those amateurs, who were fond of collecting relevant monuments, in particular, Numismatics for a long time. Although coin and medal collecting has a long tradition and there were larger collections in the city at Lviv University and the Ossolineum, private collecting didn't become popular until the second quarter of the 19th century. Thus, it is not accurate to talk about the presence of the Numismatists group until the beginning of the 20th century. There were several reasons for this phenomenon. One of which was a diverse social background of collectors, ranging from the Polish aristocrats, state and local officials, church hierarchs to the petty government officials and employees, entrepreneurs, and technical intelligentsia. In addition, the collections varied in nature and

scientific value. The approach to their formation differed as well; some collections were based on thematic directions while the others were formed by purchasing everything that was deemed more expensive (Shust, 2005, pp. 35–38). The contacts between Lviv numismatists were sporadic, and cases of cooperation were isolated. There should be mentioned the numismatic collections arrangement of Lviv University and the Ossolineum in the 1850s and 1860s by the director of the University Library, Wojciech Urbanski, and a famous Ukrainian numismatist, Ivan Stupnytskyi, Przemyśl Greek-Catholic Bishop as an example of cooperation (Shust, 1999, p. 257). We assume that the collectors and coin connoisseurs maintained some contacts, gathering information about coins and medals in collections, entering into negotiations about their exchange or purchase, and ultimately participating in the arrangement of public collections. Maurycy Dzieduszycki examined the part of Lviv numismatic collections before 1852 and submitted information about them in the press (Dzieduszycki, 1852). However, it is uncertain whether other collectors carried out similar explorations and reviews.

There were made steps in order to overcome the atomization of Lviv researchers' environment of special (auxiliary) historical disciplines in the second half of the 19th century. Several circumstances contributed to this, in particular, the onset of larger archeographic projects implementation such as, for example, the publication of "Hrodsky and Zemsky Acts from the Time of the Polish-Lithuanian Commonwealth from the so-called Bernardine Archive in Lviv", a further professionalization of the museum and archival institutions activities and the establishment of requirements for the applicants regarding the employment, the resumption of teaching by professors F. K. Liske, T. Wojciechowski, M. Hrushevskiyi of certain special (auxiliary) historical disciplines at Lviv University. The scientific seminars conducted by the Heads of Departments played an important role in training specialists and establishing contacts among the Ukrainian or Polish historians of the second half of the 19th – the first half of the 20th century. Although the seminars covered general historical issues mostly, some of them delved into the issues of Diplomatic, Archeography, Paleography, and Chronology.

There were made efforts to create associations among the amateurs and collectors, which intensified over time. In the city the numismatic movement development is considered to be a vivid example of the above-mentioned information. Lviv numismatists did not manage to establish an active society for a long time, which could be similar to Karol Beyer's group in Warsaw or Stanislaw Krzyzanowski's group in Kraków. However, a number of Lviv residents were members of the Numismatic (from 1892 – Numismatic and Archeological) Society established in 1889 in Kraków, published on the pages of the periodical "Wiadomości numizmatyczno-archeologiczne". Wojciech Ketrzynski, Head of the Ossolineum, was elected to the Board of the Society; there were the following members of the Board: Bishop I. Stupnytskyi and a historian Sadok Baracz. The society included about a dozen individuals and institutions from Lviv in the 1890s, including Włodzimierz Dzieduszycki, Ferdynand Wysocki, Aleksander Czołowski and, as a collective member, the Industrial Museum in Lviv (WNA, 1891, 1, Dodatek, pp. 1–2; WNA, 1892, 1, Dodatek, pp. 2–5 etc.). At the beginning of the 20th century Lviv historian Bohdan Barwinskyi, a museum curator Rudolf Mękicki, a bank employee, a collector Maximilian Goldstein began to participate in the Society and cooperate with its printed organ. Owing to the arrival of Przemysław Żuławski, Kraków numismatist, the above-mentioned researchers and amateurs kept in a more active contact in Lviv. He was the one, who initiated informal meetings of Lviv coins and other monuments

admirers. The first meeting took place on February 12, 1910, the second – on March 5, and in the future they were planned to be held every first Saturday of the month at five o'clock in the evening. It was indicated that the participants of the meetings would be the local members of Kraków Society, who would form their own informal association (“Kółko numizmatyków”). Regarding the format of their work, it involved conducting conversations related to the individual issues on Numismatics, Medal-making, Collecting and Archeology, the demonstration of coins, or even larger collections (for example, the collection of the Polish coins by P. Żuławski) (WNA, (1910), 3, p. 47; 4, p. 67). The meetings that were held in the Scottish (Szkocka) cafe house became extremely popular among lovers of Lviv antiquity over time. By the 1911, these meetings were held daily, and as the author of the memo on the pages of “Wiadomości numizmatyczno-archeologiczne” noted these meetings took place on the influx of willing people (WNA, (1911), 10, p. 163).

It is not possible to establish a detailed list of those who took part in these meetings. Their names were omitted in the information notices in the Society’s periodical. It is known that it was about Lviv members of the Numismatic and Archaeological Society, but there were also guests from other cities among them, including the collectors or the researchers of antiquities, who were described as people “ze świata nietylko numizmatycznego, ale i starożytniczego wogóle”. However, the activity of the group residents was not limited to a random chatter on the numismatic topics or (re)selling of numismatics. The result of the work was the growth of enthusiasm for numismatic studios in the city, which was evidenced by the publications on the pages of local and regional periodicals, the onset of new numismatic collections formation, clarification of certain controversial issues of the Polish numismatics, etc. The activity of the above-mentioned club contributed to the formation of a younger group of collectors and researchers of coins and medals in the city, among whom were R. Mękicki, Tadeusz Solski and M. Goldstein. M. Goldstein popularized Numismatics, in particular, the organization of coin and medal cabinets in gymnasiums and real schools of Galicia at the time (WNA, 1909, 7, p. 135; 11, p. 211).

The peak of activity of the above-mentioned informal association of Lviv Numismatists was in 1910 – 1911 (Wichnera, 2019, pp. 92–93). It is not possible to infer anything about his future activities, but the lack of mention in professional publications does not imply a complete halt of his work. Although the numismatics enthusiasts gatherings became less frequent, the professional environment they created still existed. The evidence was intensification of its activities during the difficult period of World War I. Other formal and informal associations of antiquity lovers did not miss the issue of numismatics, for example the so-called “Kółko starożytników” was led by the historian F. Jaworski, among whose members we came across the names of T. Solski and M. Goldstein (WNA, 1914, 6, p. 111).

Another association was created in Lviv at the beginning of the 20th century, which was connected with the development of special (auxiliary) historical disciplines. The Polish Heraldic Society is meant, which began its work in 1906 – 1908. A significant emphasis in the work of the Society was placed immediately on the scientific component, in particular, conducting and publishing research in the field of Heraldry, Genealogy and Sphragistics. In order to implement these plans, a regular issue of “The Monthly Heraldic” (“*Miesięcznik Heraldyczny*”) was published, and later – “*Rocznik*”.

The number of members of the Society increased over the following years significantly. There were about one and a half dozen people at the beginning and by the end of 1908 there were about a hundred of them, and in 1914 – about 200 (MH, 1909, 1, p. 13; 1914, 3–4, p. 80).

According to W. Semkowicz's calculations, a third of them came from outside Galicia (Semkowicz, 1934, p. 2), which means that the number of local participants was about one hundred people. The people of Lviv made up the most efficient group in the Society. Among the leaders there were such renowned people in the city as Professor of Lviv University Wilhelm Bruchnalski, Director of Ossolineum W. Kętrzyński, Head of the Archives of the city of Lviv and city museums A. Czołowski, writers and historians Józef Białynia Chołodecki, Władysław Łoziński and the others. W. Semkowicz, Associate Professor of Lviv University (an editor of publications) and Helena Polaczkówna are considered to be a junior wing. H. Polaczkówna was elected as the secretary of the Society in 1909 (MH, 1909, 1, pp. 15–16).

According to W. Semkowicz, two groups of people joined the Society. One group included the admirers of Heraldry and Genealogy, who, although they did not possess necessary scientific tools, nevertheless understood the need and value of such research. The other group was composed of professional historians, who not only saw the possibilities of using the results obtained in the course of heraldic and genealogical studies for a better understanding of historical processes, but also realized that without material, moral or any other help from the first (amateurs), for example, making their ancestral archives available, they would not be able to achieve greater results (Semkowicz, 1934, p. 2). A synergistic effect of such a Society of amateurs and professionals was supposed to give a powerful start to a further research in the field of the above-mentioned special (auxiliary) historical disciplines, and the Society was turned into a centre for coordinating the Polish scholars' efforts.

We should highlight the last one, since the Heraldic Society was of a narrow national nature character from its beginning. Despite the fact that its Polishness was outlined in the name only during the interwar period, its character was mentioned even before World War I; this was emphasized during the Second Polish Republic (MH, 1908, 1, p. 16; Semkowicz, 1934, p. 2). It did not mean that only the Poles cooperated with the Heraldic Society. There were published the publications of the Austrian Genealogist Otto Forst de Battaglia on the pages of the Society periodical, in particular, (Forst, 1911). But almost the only local Ukrainian, who cooperated with the Society actively was B. Barwinskyi. The corresponding member in 1909 – 1914, he published information on the Ukrainian Sphragistics in "The Monthly Heraldic" (Barwinskyi, 1909). There were no representatives of the other national minorities of the region, for example, the Jews, among the members of the Society. As a justification, we should also point at the absence of a large number of scholars, who were engaged in heraldic or genealogical studies among the Galician Ukrainians and the Jews, however, it seems that other, non-scientific factors also played a role.

In comparison with Lviv Numismatists, the meetings of Heraldists rarely took place. The programme of heraldic readings did not develop either. However, the Society magazines were published regularly (at first – monthly, and from the middle of 1911 – every two months), which became a platform for announcing relevant researches and experiments.

The activities of Lviv associations of numismatists and heraldists were directly aimed at promoting the development of special (auxiliary) historical disciplines. However, there were other associations and societies related to the activation of historical studies, which emerged in Lviv: the local department (a cluster) of the Historical Commission of the Academy of Knowledge (1873), the Regional Archaeological Society (1875), the Historical Society (1886), T. Shevchenko Scientific Society (1893) and the others at the end of the 19th – at the beginning of the 20th centuries. The contribution of their participants to the development of special (auxiliary) historical disciplines was different, since research on

them was not among their priority objectives. But it is worth noting that such disciplines as Paleography, Diplomatic, Numismatics, Sphragistics and Genealogy came into the field of view of the members of the Regional Archaeological Society. Their study was supposed to be conducted in four sections: (a) Heraldry, Genealogy, and Sphragistics, b) Numismatics, c) Paleography, and d) Diplomatic). The first and second sections were more active; the sections of Paleography and Diplomatic existed only on paper (Masyk, 2009b, p. 279). Owing to the efforts of the Historical Society, the publishing of the “Kwartalnik Historyczny” was launched, on the pages of which we came across the publications from special (auxiliary) historical disciplines. In July of 1890, the II Congress of the Polish historians was held in the city, a number of abstracts delivered at which related to Archeography, Historical Geography, Paleography and Diplomatics, Numismatics and Sphragistics. Separate issues from the field of the above-mentioned disciplines were elucidated more than once at the meetings of the sections of T. Shevchenko Scientific Society. We should mention the speeches made by S. Tomashivskyi at the historical and philosophical section in June of 1904 “On Territory of the Hungarian Rus at the Beginning of the 20th Century” (Khronika NTSh, 1904, 19, p. 17), M. Hrushevskyi’s report “When was Lubart’s Letter to the Lutsk Cathedral Falsified?” in April of 1906 (Khronika NTSh, 1906, 26, p. 11), I. Krypiakewych’s “On the Cossack’s Sphragistics” in June of 1914 (Khronika NTSh, 1914, 58–59, p. 15) and the others.

Due to the outbreak of World War I, the societies activities were stopped for some time. A number of scholars and collectors moved to other cities of the Habsburg state or were deported by the Russians. A social life in Lviv improved after the return of the Austrian power gradually. At the same time, the contacts between the collectors both in the city and the collectors, supporters of antiquities from other areas intensified, and in the summer of 1918, the activity of the Lviv Numismatic group was revived. Then there appeared a note in the local newspaper “Kurjer Lwowski” informing about the intention of local members of the Numismatic and Archaeological Society to organize a group (circle) that would operate on a regular basis. The meetings (“*pogadanki naukowe*”) would take place every Thursday in the restaurant of “Kraków” Hotel in the format of numismatic tea parties (“*herbatki numismatyczne*”). There would be heard discussions, negotiations, exchange of ideas and information, reports on archeology and numismatics at these meetings.

The first of the meetings took place not at the above-mentioned hotel, but at Lviv University for unknown reasons. All subsequent gatherings were held in the salon of a collector Helena Dąbczańska. At the first meeting, a temporary board was elected: the Chairman – Zygmunt Luba-Radzimiński, the Secretary – Kazimierz Sochaniewicz. There were invited not only members of the Numismatic and Archaeological Society to participate, but also everyone who wanted to be present at the meeting (KL, 1918, 20.06, p. 5). Among the first ones were Professor Edmund Bulanda, Mieczysław Rutkowski, M. Goldstein, Adam Solski. The participants were Associate Professor of Lviv University Władysław Witwicki, a doctor B. Skalkowski, an architect and engineer Ignacy Drexler (1878 – 1930). In addition to the residents of Lviv, the guests from other cities took part in the meetings, for example, M. Gumowski from Kraków and Kazimierz Osiański, a curator of Museum of Science Friends Society in Przemyśl (KL, 1918, 27.06, p. 4; 11.07, s. 5; 13.09, p. 4).

The subjects of the speeches were varied. The history of coins and coin business was discussed in the reports “St. Felix and Adauctus Cathedral in the Light of Numismatics” by M. Gumowski, “On Coins Minted during the Siege of Zamostia in 1813” M. Rutkowski, “The Polish War Bony” by T. Solski. The participants did not ignore Heraldry (K. Sochaniewicz’s

essay “On Genesis of Coat of Arms of Zamost Town”), Sphragistics (the same essay “On the Issues of Systematics of Sphragistic Collections”), Historical Toponymy (I. Drexler’s report “On Name Genesis of the City of Lublin and Dictionary of Place Names”) (Sochaniewicz, 1913, pp. 109–110; KL, 1918, 28.09, p. 6).

There were taken steps over time aimed at a further expanding the work of the group: it was decided to contact the members of the Numismatic and Archaeological Society in Lviv and Eastern Galicia with a request to send addresses, as can be assumed, to send invitations to further meetings, or to discuss other issues (KL, 1918, 22.08, p. 6). However, the idea was not implemented. The participants meetings also became rarer: from a weekly format, they, officially due to the unsatisfactory state of health of the Chairman, were supposed to take place once every two weeks from the middle of October of 1918. The last found mentions of the group date from the middle to the second half of October. Then two meetings were to be held, at one to discuss current goals and objectives (KL, 1918, 10.10, p. 11), and at the other meeting to consider important organizational issues (KL, 1918, 27.10, p. 4). We do not know whether these meetings took place and what was discussed at them. The events of the beginning of November of 1918 in Lviv, related to the proclamation of the West Ukrainian People’s Republic and the Polish-Ukrainian War, postponed further self-organization of the numismatic movement in the city for a longer time.

The activities of Lviv branch of the Numismatic and Archaeological Society resumed at the beginning of the 1920s. Its formal and informal head was F. Biesiadecki, who was a member of the society’s Board since 1918 (WNA, 1918, 7, p. 62). In the 1920s, other Lviv residents and institutions were among the members of this society, for example an engineer Tadeusz Kalkowski, R. Mękicki, Stanisław Świeżawski, Ossolineum (WNA, 1926, 1–12, pp. 70–71).

The organizational crisis that emerged in the activities of Kraków Society in the first half of the 20th century gave an impact to Lviv residents to establish their own numismatic association – the Union of Lviv Numismatists. It was founded in February of 1925 at the meeting at King Jan III Museum. A. Czołowski chaired the above-mentioned meeting. The draft of the Union Charter was approved, the leadership was elected: F. Biesiadecki (Chairman), Wiktor Chomiński (Deputy Chairman), R. Mękicki (Secretary and Treasurer) (ZN, 1925, 1, p. 28). The main objectives of the Charter were to support research in the field of Numismatics, to foster further interest in collecting the Polish numismatic material, to prevent the destruction or export of numismatic monuments outside the country, to make efforts for the further growth of public numismatic collections, etc. The objectives were ambitious, although they were mostly of a general nature. There were also more realistic goals that the Union sought to achieve, such as the completion of arrangement and opening for general inspection of Lviv public collections, the conclusion of a further register of private collections in the city, etc. (Chomiński, 1925, p. 10).

In order to implement the objectives, the Union conducted a number of activities, in particular, gathered for weekly meetings (“*zebrania towarzyskie*”), at which information about numismatic monuments was exchanged, other issues of interest to them were discussed, coins were exchanged, and auctions were organized. The meetings took place regularly in 1925 – 1927, and must have continued even further.

There were planned monthly hearings of scientific reports, but it was not possible to sustain such a rhythm. During the period of 1925 – 1927, four reports were heard: “How did the Kufic Coins Get to Poland?” by Roman Jakimowicz from Warsaw, A. Czołowski from



Lviv “About the Finds of the Ancient Coins on the Polish Lands”, Stanisław Świeżawski “Did Lviv Mint work from July 1, 1662 to April 3, 1663?” and Stanisław Moraczewski “The Excavations of Coins in Modrychy”. Because the vast majority of the Union members were hobbyist collectors, rather than scholars, there weren’t many scientific reports. However, there were exceptions. The authors of the published studies were a bank employee T. Solski, a local railway employee W. Chomiński, and an engineer S. Świeżawski.

At the third meeting in February of 1925, a decision was made to publish a periodical in Lviv around which all supporters of the Polish numismatics, both the scholars and collectors (“*everyone who was interested in Numismatics*”) would unite. R. Mękicki was chosen as the Chief and Editor-in-chief of the publication “Numismatic Notes” (“*Zapiski numismatyczne*”), and the editorial board included Lviv residents F. Biesiadecki, W. Chomiński, T. Solski and a renowned Polish numismatist M. Gumowski. The publication was supposed to appear quarterly, although its transformation into a bimonthly or a monthly was not excluded. It did not happen, and it was not possible to maintain a quarterly rhythm for a long time. The world saw nine issues of the “Numismatic Notes” (four in 1925, three, one of which was paired, in 1926, two in 1928) and five issues (three in 1926, one of them paired, and two in 1928) of the illustrated appendix to the “Notes”, which was called “Pieniądz papierowy” (an editor – T. Solski). The subsequent release of the periodical and supplement was hindered by a lack of funds: there were about a hundred subscribers, which did not cover expenses. Charity auctions were organized twice in order to cover the needs of the publishing house; for the same purpose, the Union was ready to accept duplicates of coins, orders, medals, etc., for sale from interested parties (ZN, 1926, 1, p. 19; 2, p. 49).

In the 1920s, there were three dozen members in the Union, an active participation in its work by a dozen people. Some members of the Union lived outside the city and did not participate in the meetings; the Union also included several organizations and societies, for example, the National Art Gallery in Lviv, Wielkopolska Museum in Poznań, the Ossolineum (ZN, 1925, 4, pp. 108–109; 1926, 1, p. 19). The Union established in Lviv united the Polish scholars, museum workers, and collectors mainly, who became an obstacle to the association potential growth. The only exception was the participation in the association work of the collector of the Judaic studies (the Jewish studies), the owner of a rich numismatic collection M. Goldstein. On the other hand, there was no single Ukrainian in the Union.

The activities of the Heraldic Society were reactivated during interwar period: in May of 1920, the first post-war general meeting was held. It quickly became clear that inexorable changes were coming to the Heraldic Society activities. Some of these changes had a personal dimension. It was about the need to rotate management and attract new scientific forces due to the departure of an older generation. However, there were other, more fundamental circumstances that affected the society work from now on. Lviv lost its capital status after the restoration of the Polish state. It was impossible to keep the leadership of the Heraldic Society in it, and from the end of 1930 its central seat was moved to Warsaw. The result was a gradual decrease in the number of Lviv residents in the society management, the transfer of periodicals publishing to Kraków and Warsaw, and the institutionalization of work in the city in 1926 by Lviv branch of the Polish Heraldic Society. However, among the members of the society there were renowned Lviv scholars, museum workers and collectors A. Czołowski, F. Biesiadecki, K. Sochaniewicz, Przemysław Dąbkowski, H. Polaczkówna, Jan Ptaśnik. Although the meetings of the Society (and later its Lviv branch) were held several times a year, they mainly related to current activities, but the practice of listening to reports on

heraldic and genealogical issues, neglected at the beginning of the 1920s, was revived with difficulty, there were no a lot: one report, sometimes two reports a year. The above-mentioned form of scientific work, despite its importance, was not particularly popular. It was not possible to activate the relevant studios in Lviv department in the 1930s, despite the decision to hold separate discussion meetings with the reading of abstracts every quarter. It is not known how often and how long the meetings of Lviv branch carried on in the future. In 1939, A. Czołowski, at the request of local authorities, indicated that after the death of some and the departure of the others from the city, “*the [Heraldic – O. Ts.] Society in Lviv has neither a Board capable of conducting legal activities, nor members*” (Puđowski, 1993, p. 167). However, a number of Lviv residents were listed as members of the Polish Heraldic Society in the mid-1930s. There were included such city institutions as the State, Zemsky and City Archives and the Baworowski Library, the editorial office of the “*Kwartalnik Historyczny*” and the Institute of Auxiliary Historical Sciences of the University of Lviv at that time.

During the interwar period, Lviv Branch of the Polish Heraldic Society and the Union of Lviv Numismatists were involved in various activities that demonstrated the city’s interest in the development of special historical disciplines. However, they also highlighted the challenge of operating effectively for an extended period of time. There were several reasons for this state of affairs, including the lack of a proper material basis and a narrow national nature of members. However, we should keep in mind that another, no less important circumstance was the activity of other scientific societies in Lviv, with a more respectable reputation, publications and meetings. The Scientific Society emerged in the city at the time, which held regular meetings with listening to the scientific reports and abstracts. A number of them were published in the periodical (“*Archiwum Towarzystwa naukowego we Lwowie*”, published since 1923); in abbreviated form (as theses) – on the pages of the published reports. A fairly significant share of speeches and abstracts concerned the issues of Diplomatic and Paleography, Archeography, Archival Science, Historical Geography and Demography, Heraldry and Shpragistics, Numismatics, Genealogy, Papyrology, Historical Metrology (Sprawozdania Towarzystwa naukowego we Lwowie, 1921, 1, p. 1; 3, p. 182; 1922, 2, p. 63; 1923, 1, p. 2; 3, p. 88; 1924, 1, p. 2; 1925, 2, p. 30; 1926, 1, p. 2; 2, p. 48; 1927, 1, p. 2–3; 1928, 1, p. 2; 2, p. 42; 3, p. 151; 1929, 1, p. 3; 2, p. 69; 3, p. 178; 1930, 2, p. 47; 1931, 1, pp. 2–3; 3, p. 106; 1932, 3, p. 146; 1933, 3, p. 142; 1934, 3, p. 194; 1935, 1, p. 3; 2, p. 65; 3, p. 160; 1936, 2, p. 114; 3, p. 235; 1937, 1, pp. 3–4; 3, pp. 212–213; 1938, 1, p. 4; 2, p. 137; 3, pp. 244–245; 1939, 1, pp. 3–5). The number of reports and abstracts from these disciplines heard at the Scientific Society meetings many times exceeded similar speeches at the meetings of the Heraldic Society and the Union of Lviv Numismatists, whose members (the same P. Dąbkowski or T. Modelski) worked more actively within the Scientific Society, rather than the Heraldic or Numismatic of Associations.

T. Shevchenko Scientific Society remained the main platform of the scientific cooperation for the Ukrainian scholars in interwar Lviv. Some news about studies in the field of special (auxiliary) historical disciplines can be found in reports on the work of sections and commissions of the society. The reports on genealogical topics were given by B. Barvinskyi (“The Family of Eichinger” and “The Family of Konashevych in the Przemyśl Land of the 15th and 16th Centuries”), Omelian Pritsak (“The Genealogy of the Skoropadskyi”) (Khronika NTSh, 1926 – 1930, pp. 69–70, 72; 1937 – 1938, 74, p. 49), on Heraldry issue was presented by Ivan-Yulian Shpytkovskiy (“Introductory Information on the Ukrainian Heraldry, Part I”) (Khronika NTSh, 1931 – 1932, 71, p. 23), on Shpragistics – by Yaroslav Pasternak (“Seal with the Inscription “Днѣслово” from Belz”), on Numismatics – by Roman Zubyk (“The Treasure of Coins from the 13th century from Bolotna in Przemyśl Region”). A chief focus was on the issues of Historical Geography and Historical Topography, and relevant abstracts were prepared by Myron Korduba (“Where was the Ancient Town of

Khmeliv Located?”, “Traces of the Germanic Trade Route through the Ukrainian Lands in the Half of the 1st Millennium BC”), I. Krypiakievych (“Studies about the State of B. Khmelnytskyi. I. Borders. II. Roads”, “Historical Review of the Ethnographic Boundaries of Galicia and Chelm land in the West”, “Map of Galicia under the Rostyslavychi’s Rule”, “Non-localized Chronicle Topographical Names”) (Khronika NTSh, 1926 – 1930, 69–70, p. 71), Jaroslav Rudnytskyi (“The Origin of the Name of Sambir Town”, “The Origin of the Name of Terebovlia Town”), Teofil Kostruba (“Unexplained Historical Names”, “Whether Belz Belonged to the Cherven Cities”) (Khronika NTSh, 1932 – 1934, 72, p. 76; 1935 – 1937, 73, pp. 52–54; 1937 – 1938, 74, pp. 47–48) and the others. A number of studies on special (auxiliary) historical disciplines were published by members of T. Shevchenko Scientific Society on the pages of its “Notes”, other periodicals or in separate books, in particular studies on Genealogy (Barvynskyi, 1930), Heraldry and Shpragistics (Barvynskyi, 1925), Numismatics (Polianskyi, 1926; Krypiakievych, 1924), Bonistics (Hnatyshak, 1931a; Hnatyshak, 1931b), Historical Geography (Korduba, 1924; Korduba, 1938; Terletskyi, 1930). However, unlike the Polish scholars, their Ukrainian colleagues failed to establish professional heraldic or numismatic associations. The only known attempt, which was made to establish such a union dates back to 1928, when an initiative group was supposed to meet to found the Ukrainian Heraldic Society (Hrechlyo, 2008, p. 4). However, it was not founded.

The beginning of World War II and the first Sovietization of Western Ukrainian lands affected fundamentally the activities of formal and informal societies and associations of researchers of special (auxiliary) historical disciplines in the city. A gradual but unceasing planting of new forms of state and a social life could not coexist with uncontrolled or unauthorized forms of organization and self-organization of scholars. As a result, T. Shevchenko Scientific Society stopped operating; nothing is known about the activities of the Numismatic Union or Lviv branch of the Polish Heraldic Society. Certain contacts between their participants could be maintained, but these were private meetings in a narrow circle, which hardly led to scientific discussions or research. Hence, there is no need to write about any formal or informal associations of researchers of special (auxiliary) historical disciplines in the 1940s. A personal composition of the city’s historians changed significantly, as a number of the Polish and Ukrainian scholars died (such as R. Mękicki, H. Polaczkówna, Mykola Golubets) or left Lviv (O. Pritsak, M. Haisig, T. Modelski, etc.)

The studies in these disciplines were not stopped during the post-war period – the city remained a base for such research, scientific personnel capable of solving tasks, but their progress was hindered. The situation began to change for the better during the so-called the Khrushchev thaw, when a favourable background was created for the development of the Ukrainian humanitarianism, the search of new forms of scientific cooperation, the resumption of research on previously intolerable topics, including special (auxiliary) historical disciplines.

There was a need for the emergence of similar to pre-war associations of scholars, which was realized in the early 1960s in the activities of the Theoretical Seminar on Source Studies and Special Historical Disciplines at the Central State Historical Archive of Ukrainian SSR in Lviv. The inspiration of this seminar is considered to be made by I. Krypiakievych. It was he who made efforts to make the seminar a platform for the exchange of ideas and the training of young scholars (Orest Matsiuk, Oleh Kupchynskyi, Oleksiy Markevych, etc.), who over time turned into renowned scholars and authorities in their fields of knowledge, continuing the traditions of their predecessors. It involved not only archivists, but also scholars of Lviv University (Ya. Kis’ , Volodymyr Zvarych, Vitaliy Havrylenko, etc.), the Institute of Social Sciences (Ya. Isaievych, Feodosiy Steblii, Volodymyr Ohonovskyi, etc.), a number of local museums, libraries of the Academy of Sciences (nowadays – V. Stefanyk Scientific Library). One of the peculiarities of the Seminar activity was that people, who we can call amateurs or

amateur local historians took part in its work, i.e. those who, due to certain circumstances, found themselves outside the boundaries of institutions called to engage in historical and research activities, but did so at the behest of the heart and soul. Such were the local historian Yosyp Hronskyi, an artist Hryhoriy Smolskyi, a teacher Yosyp Kril.

Owing to involvement of a wide range of local and visiting scholars, amateurs, planned nature of work set from the beginning allowed the Theoretical Seminar to operate for two dozen years. The Theoretical Seminar went beyond the laws and regulations traditional to the Soviet regime, becoming the successor of those formal and informal associations of researchers, who worked in the city until September of 1939, preserving the spirit of friendly meetings and contacts, creative work and the search of new horizons. In the topics of conferences and monthly seminars, the predominant place was given to archival studies and source studies, but a significant place was given to Diplomatic, Paleography, Heraldry, Genealogy, Sphragistics, Numismatics, Historical Chronology, Codicology, Historical Geography and Historical Toponymy, Historical Cartography (Bezdrabko, 2009, pp. 139–170). The majority of materials were designed as monographs, catalogues, articles, reference books over time, which to this day constitute the golden fund of these disciplines historiography.

The above-mentioned seminar gradually lost its pace and importance as an interdisciplinary platform for specialists in special historical disciplines in the city from the 1970s to the 1980s. The number of meetings decreased, the group of participants was limited mainly to the archive workers. However, dozens of the scholars formed within the framework of the seminar acted and worked both in the archive and outside of it. Young scholars joined them gradually. It was possible to reanimate the work of the archival seminar, with reports and announcements made by archive employees at the end of the 1980s and at the beginning of the 1990s (Tsarova, 1990, p. 79). Under the conditions of the revival of national life and the struggle for the restoration of Ukraine's independence, new institutions were established in the city and the activities of old ones were revived. In July of 1990, the Ukrainian Heraldry Society was founded in Lviv, designed to promote work in the field of Heraldry, Genealogy, Sphragistics, and Vexillology. Even earlier – in the fall of 1989 – the activity of the T. Shevchenko Scientific Society was resumed, as part of the historical and philosophical section of which the Commission of special (auxiliary) historical disciplines and source studies appeared. The emergence of the above-mentioned society and the Commission testified to the continuation of the tradition of creating in the city associations of scholars of special (auxiliary) historical disciplines, associations that allowed and allow to maintain a high standard of relevant studies, train new generations of specialists.

**The Conclusions.** Despite a long tradition of teaching special (auxiliary) historical disciplines in Lviv, the activities of the renowned Ukrainian and Polish scholars led to the establishment of the first professional societies at the beginning of the 20th century. The Heraldic Society was organized in the city, and an informal group of local members of Kraków Numismatic and Archaeological Society functioned at the time. The activities of these associations proved the overcoming of a certain atomization in this environment, transition to more organized forms of activity, involvement of not only professional historians, but also amateurs. When Lviv branch of the Polish Heraldic Society operated in the city, and the Union of Lviv Numismatists was founded, the traditions of such work carried on during the interwar period. The result of their work was the growth of interest in Numismatics, Heraldry, Sphragistics and Genealogy, the emergence of publications on the pages of the local periodicals, and the publication of new professional journals. There was a certain, noticeable decline in the activity of such professional associations in the 1930s, due to financial issues, activity of a number of other professional historical associations in the city, and a narrow national character of their composition. The experience of these societies, as well as T. Shevchenko Scientific Society, was shared during the organization

of the Theoretical Seminar on Source Studies and Special (Auxiliary) Historical Disciplines in 1961, which operated for two decades at the Historical Archive in Lviv. The Theoretical Seminar not only became a continuation of those formal and informal associations of scholars, who worked in the city until September of 1939, but also formed a new generation of the Ukrainian professionals in special (auxiliary) historical disciplines.

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**DEVELOPMENT OF UKRAINIAN ARCHEOLOGY IN THE SECOND HALF OF THE 19th – 30s OF THE 20th CENTURY IN THE CONTEXT OF WOMEN'S HISTORY: A SOURCE-BASED REVIEW**

**Abstract.** *The purpose* of the research is to analyze the source base of the activity issue of the Ukrainian women archaeologists in Naddniprianshchyna region during the second half of the 19th – 30s of the 20th century. **The research methodology** includes the application of a set of the following methods: dialectical, idiographic, prosopographic, comparative, historical feminology, microhistory, biographical. Inductive and deductive methods have been also used to reconstruct certain historical phenomena according to historical sources. **The scientific novelty** of the current scientific article consists in the implementation of a comprehensive general analysis of historical sources on the



development issue of Ukrainian archeology in the second half of the 19th – 30s of the 20th century in the context of women's history. Historical sources have been clearly systematized. The classification of sources according to the method of recording information has been applied as the most optimal. Analytical criticism of each group of sources has been carried out, the level of scientific significance and reliability of each group of sources has been determined. A chief focus is on the source base specificity of the current issue. A brief review of the researched sources has been carried out in central and regional archives. **Conclusions.** It has been determined that the specificity of the source base of the issue of women's entry into the archaeological science of Ukraine is the use of a huge number of sources of a personal origin (ego-sources) – memoirs, archaeological diaries and reports, epistolary materials, etc. It has been found that the most optimal classification for the study of sources on the issue is the classification by the method of recording information, according to which the studied sources are divided into oral and written. Such a variety of oral sources as an interview, which is actively used in the framework of oral history to obtain oral testimony about a specific event or a specific historical personality, has been studied. The analysis of the interview text with candidate of historical sciences, a senior researcher of the Institute of Archeology V.M. Korpusova, who for a long time was a personal laboratory assistant of the famous female archaeologist M.I. Viazmitina, has been carried out.

**Key words:** archeology, women's history, archaeological excavations, ego-sources, epistolary materials, memoirs, clerical sources, interviews, cartographic sources, scientific value of historical sources.

## РОЗВИТОК УКРАЇНСЬКОЇ АРХЕОЛОГІЇ У ДРУГІЙ ПОЛОВИНІ ХІХ – 30-х рр. ХХ ст. В КОНТЕКСТІ ЖІНОЧОЇ ІСТОРІЇ: ДЖЕРЕЛОЗНАВЧИЙ ОГЛЯД

**Анотація.** Метою пропонованої наукової студії є вивчення джерельної бази проблеми діяльності українських жінок-археологів Наддніпрянщини протягом другої половини ХІХ–30-х рр. ХХ ст. **Методологія** дослідження включає застосування сукупності таких методів: діалектичного, ідіографічного, просопографічного, порівняльного, історичної фемінології, мікроісторії, біографічного. Також використано індуктивний і дедуктивний методи задля реконструкції певних історичних явищ за даними історичних джерел. **Наукова новизна** статті полягає у здійсненні комплексного узагальнювального аналізу історичних джерел з проблеми розвитку української археології в другій половині ХІХ – 30-ті рр. ХХ ст. в контексті жіночої історії. Історичні джерела було чітко систематизовано завдяки залученню як найбільш оптимальної їх класифікації за способом фіксації інформації. Здійснено аналітичну критику кожної групи джерел, визначено рівень їх наукової значущості і достовірності. Акцентовано увагу на специфіці джерельної бази винесеної на обговорення проблеми. Здійснено стислий огляд досліджених джерел в окремих центральних та обласних архівах. **Висновки.** Встановлено, що специфікою джерельної бази проблеми входження жінки в археологічну науку України є використання величезної кількості джерел особового походження (ego-джерел) – мемуарів, археологічних щоденників та звітів, епістолярних матеріалів тощо. З'ясовано, що найбільш оптимальною класифікацією для дослідження джерел з означеної проблеми є класифікація за способом фіксації інформації, згідно з якою джерела поділяються на усні та писемні. Було вивчено такий різновид усних джерел, як інтерв'ю, що активно застосовується у рамках усної історії для отримання свідчень щодо певної події або конкретної історичної особистості. Здійснено аналіз тексту інтерв'ю з кандидатом історичних наук, старшим науковим співробітником ІА НАНУ В.М. Корпусовою, яка протягом тривалого часу була персональною лаборанткою відомої жінки-археолога М.І. Вязьміної.

**Ключові слова:** археологія, жіноча історія, археологічні розкопки, ego-джерела, епістолярні матеріали, мемуари, канцелярські джерела, інтерв'ю, картографічні джерела, наукова цінність історичних джерел.

**The Problem Statement.** One of modern promising areas of historical science is women's history. Women's history is multifaceted. One of its urgent problems is the study of the role of women in science, which for a long time was considered an exclusively male field. In the

second half of the 20th century, scholars began to study the role of women in the development of historical science, particularly in archaeology. The research of the source base of this issue is of a particular interest. The development of archeology as a separate historical science in Trans-Dnieper (Naddnyprianska) Ukraine took place during the second half of the 19th century. A gradual entry of the Ukrainian women into the space of this scientific field at the professional level also began in this era.

**The Review of Recent Publications.** Scientific works, in which certain aspects of the activity of Ukrainian women archaeologists of Transdnieper (Naddnyprianshchyna) region during the second half of the 19th century – the 30s of the 20th century are studied, are diverse and numerous, but there are no generalizing special works of a source-scientific content on the activity issue of the Ukrainian women archaeologists of Transdnieper region during the second half of the 19th century – the 30s of the 20th century. Therefore, the purpose of this research is to study the source base of this issue (Costa, 2020; Mesa, 2022; Nelson, 2015; Rivero-Aponte, 2021; Wright, 1998).

The specificity of the source base for the study of women's entry into the archaeological science of Ukraine is the use of a huge number of sources of a personal origin (ego-sources) – memoirs, archaeological diaries and reports, epistolary materials, etc.

**The Results of the Research.** The majority of the historical sources on the researched topic are kept in the archives of the city of Kyiv. For example, in the Central State Archives of Supreme Bodies of Power and Government of Ukraine (CSASBPCU), the materials of the fund of the People's Commissariat of Education were analysed (CSASBPCU, f. 166, d. 2, c. 774; c. 1211; f. 166, d. 6, cc. 7656, 7660, 7661; f. 166, d. 9, c. 1482), personal funds of Professor D. V. Antonovych (CSASBPCU, f. 3956, d. 1, cc. 14, 15, 16) and N. D. Polonska-Vasylenko (CSASBPCU, f. 3806, d. 1, cc. 41, 42, 43). In the Central State Historical Archives of Ukraine in Kyiv (CSHAUK) the materials of the fund of the Kyiv Educational District Office were studied (CSHAUK, f. 707, d. 70, c. 73; f. 707, d. 74, c. 261) and a personal fund of V. B. Antonovych (CSHAUK, f. 832, d. 1, cc. 167, 168, 173, 174, 198, 205, 216, 226). Important for the study of this issue are the documents of the State Archives in the City of Kyiv (SAK), in particular the fund of the Kyiv Higher Women's Courses (SAK, f. 244, d. 1, cc. 94, 105; f. 244, d. 1.1, c. 10, 54, 88, 110; f. 244, d. 1.2, c. 4893; f. 244, d. 17, cc. 1, 320a).

Many important documents are stored in the funds of the Scientific Archive of the Institute of Archeology (SAIA NASU), in particular the funds of the All-Ukrainian Archaeological Committee (hereinafter – the VUAK) personal funds of M. I. Viazmitina (SAIA NASU, f. 34), V. V. Khvoika (f. 2, d. 3, c. 197), D. M. Scherbakivsky (f. 9, c. 168/K–420–433, c. 168/K–420–433), P. P. Efimenko (f. 67, c. 9).

The materials of the Manuscript Institute of the National Library of Ukraine named after V. I. Vernadsky (MI NLUV), in particular materials of Literary Fund (the diary of the excavations of Yu. F. Abaz) (MI NLUV, f. I, c. 7780), documents “Archive of V. S. Ikonnikov, Materials Related to Higher Women's Courses” (MI NLUV, f. 46, c. 703).

It should be noted that we examined the documents of the State Archive of Kherson oblast (SAKhO) (the fund of Kherson department of the district communal economy (SAKhO, f. 456, d. 1, c. 22); the fund of Kherson district financial department (SAKhO, f. 440, d. 2, c. 1261), the funds of the Kherson district financial department, which contain important facts about the life and scientific activity of I. Fabricius, a famous female archaeologist of the studied era. Some documents from the archive of Dmytro Yavornytsky National Historical Museum of Dnipro (NHMD) (foundation of the Ukrainian historian D. I. Yavornytskyi

(NHMD, f. 10, arhive 12171, arhive 12174) highlight the scientific contribution of other famous women scholars – A. A. Skrylenko and A. A. Kartsova-Myklashevska.

The specificity of the chosen issue makes it expedient to use a certain classification of sources. We used, as the most optimal, classification of sources according to the method of recording information, according to which the studied sources are divided into oral and written.

In the scientific publication, such a variety of oral sources as an interview, consisting of thematic blocks and containing a list of mandatory aspects, was used. The interview is actively used in the framework of oral history to obtain oral testimony about a certain event or a specific historical figure. The text of the interview with V. M. Korpusova, candidate of historical sciences, senior researcher of the Institute of Archeology of NASU, who for a long time was a personal laboratory assistant of M. I. Vyazmitina and took part in archaeological expeditions under her leadership, was studied. It is natural that V. M. Korpusova was well-versed in many issues of the course and content of these archaeological explorations, which increases the informative value and importance of this interview. Its content sufficiently fully characterizes the personality of M. I. Vyazmitina as a researcher (SAIA NASU, f. 34).

The studied written materials can be conditionally divided into two types – documentary and narrative. The complex of documentary sources is represented by clerical, legal, cartographic materials. The most numerous group consists of clerical (business) sources. Business sources arose as a result of the activities of higher educational institutions, central and regional scientific societies and institutions during the times of the Russian Empire and the Soviet Union.

One of the important administrative documents is the Statute of the Moscow Archaeological Society, approved by the Minister of Public Education on September 19, 1864. It contains the main goals of archaeological research at the time. According to §1, “The Imperial Archaeological Society has as its subject the study of classical archaeology, mainly monuments of the Middle Ages and modern numismatics, both Eastern and Western” (Veselovskiy, 1900).

One of the paragraphs of the Statute forbade the arbitrary conduct of archaeological research on the territory of the Russian Empire, which contributed to some extent to the cessation of “robbery” excavations of monuments.

Informatively valuable for our research is the “Regulations on Higher Courses for Women in Kyiv” of 1878 (SAK, f. 244, d. 17, c. 1). It formulated the main goals and objectives of the courses, the rules for admission, training and graduation of trainees.

The Statute of the Kyiv Archaeological Institute of 1921, which regulated all issues of management and activity of the institute (rules of admission of students, duties and powers of a director and teachers, gender of students) should be singled out (CSASBPCU, f. 3806, d. 1, c. 43).

Some clerical documents are stored in the TsDAVO. They are represented by the official correspondence of the VUAC with museums, scientific institutions, and individuals; journals of meetings, protocols of the Presidium of the VUAC; reports from archaeological expeditions, diaries of excavations (CSASBPCU, f. 166, d. 6, cc. 7660, 7661).

The majority of the letters refer to granting permission for excavations. The listed sources contain important information about the places of archaeological exploration, the chronological and cultural localization of monuments, the leaders of expeditions, and their composition. These materials were considered and approved at the state level, which determined their high level of reliability and scientific value.

Lists of students of Kyiv Higher Courses for Women (KHCW), minutes of meetings of the Faculty of History and Philology, and the Pedagogical Council were analysed (SAK, f. 244, d. 1, cc. 94, 105; SAK, f. 244, d. 1.1, cc. 10, 110).

A. A. Skrylenko's reports on replenishment of the collection of the Museum named after O. Pol were under analysis as well (NHMD, archive K 94/Н-22).

In the reports there is characterized her participation in the organization of the XIII Archaeological Congress, as well as her professional competencies; there is personal information about a family status, and financial capabilities of A. A. Skrylenko and other women scholars (CSHAUK, f. 707, d. 70, c. 73; f. 707, d. 74, c. 261).

The archival funds of Archive of the personnel department of the Institute of Archaeology (APD of IA) store the personal files of female archaeologists (M. I. Vyazmytina (APD of IA, personal file of M. I. Vyazmitina) and I. V. Fabricius (APD of IA, personal file of I. V. Fabricius).

They include personal cards, autobiographies, extracts from documents on the awarding of scientific degrees, orders on the conduct of archaeological explorations, etc. The scientific value of the listed materials is that they meticulously record the main life events and scientific achievements of M. I. Vyazmitina and I. V. Fabricius.

As mentioned above, cartographic sources supplement the source base significantly. The peculiarity and advantage of cartographic sources is that they not only significantly supplement the available information, but also contain information in a concentrated form that can be considered as independent information sources. This group, which is very important for current research, includes maps of archaeological excavations made by women archaeologists, and plans for conducting archaeological excavations. They make it possible to determine a temporal and spatial localization of an archaeological research in a certain area (Kherson and Kyiv oblast), testify to the total area of excavations and the number of material objects investigated, etc. The survey map of I. V. Fabricius (a director of the Kherson Historical and Archaeological Museum) in September-October of 1928, the map of the excavations of mounds near the village of Ivanivka was found and studied under the leadership of I. V. Fabricius in 1928, excavation drawings near the village of Balyky under the leadership of V. E. Kozlovska in 1926 (SAIA NASU, f. VUAK, c. 202/13-a).

The current publication draws on a significant array of narrative sources. They can be conditionally divided into personal, historical, and scientific. The majority of narrative sources used are documents of a personal origin, in relation to which years the term ego-sources has been used in scientific circles recently. The peculiarity of the source base of this publication is that it is ego-sources that form its basis.

One of the functions of sources of a personal origin is the establishment of interpersonal communication. Ego-sources contribute to a self-awareness of an individual and establishment of interpersonal relations. The elaborated sources of a personal origin can be placed in the following order according to the degree of probability: a) autobiographies; b) diaries; c) epistolary materials; d) memoirs.

The researched autobiographies of women archaeologists allow us to reproduce and supplement information about their life and creative paths. For example, the documents of the personal fund of V. B. Antonovych of the Centre of Central Intelligence Agency of Ukraine, including autobiography, are important for the reproduction of the biography of K. M. Melnyk-Antonovych (CSHAUK, f. 832: V. B. Antonovych, c. 198).

The autobiographies of M. I. Vyazmitina and I. V. Fabricius were also discovered and researched (APD of IA, personal file of M. I. Vyazmitina; APD of IA, a personal file of

I. V. Fabricius), which are stored in the funds of the NAIA of the National Academy of Sciences. The authors described the main stages of their own lives, provided many facts about their professional activities, and presented a list of scientific publications.

An important source of a personal origin is diaries, the informational content of which has a high degree of probability because they were created on the heels of events, often on the same day when these events took place. The researcher, using the testimony of the author of the diary, can determine the location of the author and his impressions of the events he witnessed.

A valuable source, in fact, a diary in terms of content and structure, is the “Travel Notes” (“Travel Notes”) of M. I. Vyazmitina, which are kept in the personal fund of M. I. Vyazmitina of the Scientific Archive of the Institute of Archeology of the National Academy of Sciences (SAIA NASU, f. M. I. Vyazmitina).

The author testifies about her trip to Uzbekistan in 1928 – 1929. The woman collected materials for writing a PhD thesis, the subject of which was the applied art of Central Asia. In them, the researcher describes the collections of the museums in Tashkent, Samarkand, and Bukhara in detail.

The diary of A. L. Ikonnykova, a former graduate of Kyiv Higher Women’s Courses (Manuscript Institute of the V. I. Vernadsky National Library of Ukraine) has been preserved. In it, the author provides information about students, their academic success, characteristics of teachers, feedback by teachers about students’ achievements (MI NLUV, f. 46, c. 703).

A specific type of ego-sources is the epistolary heritage of women archaeologists. The letters contain information that is not available in other sources. The content of the epistolary materials allows us to find out the nature and strength of the influence of male archaeologists on the formation of women as scholars in archaeological science. The letters describe the interaction of female archaeologists and male archaeologists in the process of joint work. The letters allow us to trace the evolution of the attitude of men towards women in the scientific field from contempt to respect.

A chief focus is on the correspondence between D. I. Yavornytsky and A. A. Skrylenko, the curator of the museum named after O. Pol. These letters are kept in the personal fund of the scholar (NHMD, f. 10, archive K 94/H–22; Abrosymova, 1997).

The correspondence of D. I. Yavornytsky with the head of the Moscow Archaeological Society P. S. Uvarova regarding the organization and holding of the 13th Archaeological Congress is also valuable for our research. This correspondence contains not only a complex of important testimonies about the development of archaeological science in Ukraine at the time, but also about the personality of A. A. Skrylenko (NHMD, f. 10, archive K 94/H–22, archive 12171, archive 12174, archive 12186.).

In the personal fund of D. I. Yavornytsky there is also the correspondence of the scholar with A. M. Myklashevsky, the father of A. A. Kartsova-Myklashevskaya (Abrosymova, 1997), B. E. Kozlovska (Abrosymova, 1997), I. V. Fabricius (Abrosymova, 1997), which characterize their professional activity. The majority of these letters were published in the collection “Epistolary Heritage of Academician D. I. Yavornytsky” (Abrosymova, 1997).

The letters of K. M. Melnyk, an archaeologist, and wife of V. B. Antonovych are of particular value. They are stored in the personal fund of D. V. Antonovych at the Central Agency for the Development of Social Sciences and Humanities. The wife of D. V. Antonovych was a friend and corresponded with the researcher A. A. Skrylenko for a long time (CSASBPCU, f. 3806, c. 16).

These letters reveal unknown pages of the life of the latter to us. The correspondence of K. M. Melnyk-Antonovych with a famous scholar and teacher A. S. Siniavsky has also been preserved (CSASBPCU, f. 3956), the wife of a prominent Katerynoslav activist and patron O. Pol, academician D. I. Bagaliy (CSASBPCU, f. 3956, c. 14), with V. Yu. Danylevich (CSASBPCU, f. 3956, c. 16). In his letters, V. Yu. Danylevich reports to K. M. Melnyk-Antonovych about various facts of an archaeological life at the time.

Many important facts from the biography of Kateryna Mykolayivna Melnyk-Antonovych are contained in her correspondence with her parents – M. M. Melnyk and M.O. Melnyk (CSASBPCU, f. 3956, c. 15).

In the letters to her parents, and this is natural, sincere, frank, and intimate, Kateryna Mykolayivna shares her worries and experiences, consults about joining the Moscow Archaeological Society describes her archaeological travels with V. B. Antonovych in detail. Her correspondence with V. B. Antonovych has been preserved. It characterizes her scientific views and reveals a woman's married life. In the letters to her parents and her husband, Kateryna Mykolayivna appears as a daughter and a wife.

Some letters from the IR of the NBUV were studied, in which a dramatic period of the life of K. M. Melnyk-Antonovych during in the Soviet times is traced. From them, we learn about the support and assistance of Kateryna Mykolayivna from D. I. Bagaliya and M. S. Hrushevsky.

Thus, K. M. Melnyk-Antonovych's letters are scattered in various archival institutions, complement each other, and provide an opportunity to reproduce a relatively complete picture of the life of a female archaeologist.

Important for the current publication are the letters of V. E. Kozlovskaya, a famous female archaeologist at the beginning of the 20th century. Her correspondence is kept in the Scientific Archive of the Institute of Archaeology. There is no personal fund of V. E. Kozlovskaya, so the materials are scattered in other funds of the archive. Her correspondence with her teacher V. V. Khvoika attracts attention (SAIA NASU, f. 2, d. 3, c. 197).

V. V. Khvoika advises the student, advises her on excavations, drawing up relevant report documentation. The contents of the letters show that V. V. Khvoika was taken care of by V. E. Kozlovskaya, who helped in the search of a job because at that time it was difficult for a woman to find a job in her specialty.

In the personal fund mentioned above, V.V. Khvoika found and studied the correspondence of V. E. Kozlovskaya with P. P. Kurinny (SAIA NASU, f. 2, d. 3, c. 197), which testifies to the long-term friendship of V. E. Kozlovskaya and P. P. Kurinny, and characterizes the scientific views of V. E. Kozlovskaya, her human qualities. Some letters contain information about the archaeological explorations of colleagues (K. M. Melnyk-Antonovych and V. Yu. Danylevych). In some letters, the researcher describes her excavations, and consults with her mentor on many scientific issues.

In the personal fund of D. M. Shcherbakivsky, as part of the Scientific Archive of the Institute of Archeology, letters from V. E. Kozlovskaya to D. M. Shcherbakivsky were found (SAIA NASU, f. 9, c. 168/K-420-433, c. 168/K-420-433, c. 168/K-420-433) in which she touches on many issues directly related to her museum activities, the scientific life of Kyiv, characterizes the researcher as a professional museum worker and scholar.

For our research, the epistolary of M. I. Vyazmitina (Scientific Archive of the Institute of Archeology), which is stored in her fund, is of great scientific importance. M. I. Vyazmitina regularly corresponded with many famous scholars of the time for a long period.

M. I. Vyazmitina's correspondence with her teacher, a prominent art critic V. M. Zimmer attracts attention (NAIA NASU, f. 34).

The contents of these letters show that these scholars were colleagues and friends at the same time. The studied letters characterize M. I. Vyazmitina first of all as a scholar. Letters to a woman from Professor M. E. Masson reveal the professor's respect for her as an archaeologist (SAIA NASU, f. 34).

Together, they conducted excavations in Central Asia (Nova Nissa), so M. E. Masson was able to personally observe the level of M. I. Vyazmitina's work.

The focus is on the correspondence of M. I. Vyazmitina with the Voloshyns (SAIA NASU, f. 34). M.O. Voloshyn was a famous writer, painter, and popular figure among the Ukrainian creative intelligentsia. He believed that M. I. Vyazmitina would successfully realize herself in the scientific field. This correspondence primarily reveals the woman's personal life, full of emotions and sincere expressions.

Memoirs are an important type of source of a personal origin. They, like epistolary materials, are characterized by a fairly high level of subjectivity, but this does not diminish their value for our publication. The value of memoirs is determined by the following factors: the author's role in the described events, the acuteness of the author's reception of real events, the author's ability to remember the sequence of events, the time of writing memoirs, etc. Memoirs, which are created almost immediately after the events, more reliably, in most cases, convey the content of these events. The content of memoirs written many years later is negatively affected by the dulling of the author's memory, and changes in the author's views and preferences. When researching the current issue, those memoirs that were written many years after the events under study were analysed.

The memoirs of P. S. Uvarova, the first female archaeologist in the Russian Empire, deserve a special focus. They contain a lot of information about the formation and development of archaeological science of the late 19th and early 20th centuries in Russia and Ukraine in particular (Uvarova, 2005).

P. S. Uvarova faithfully recreated the atmosphere of the era, in particular the attitude of the archaeological scientific society to the appearance of a woman archaeologist, the author describes numerous meetings and acquaintances with Russian and foreign scholars. The researcher describes in detail the work related to the preparation and holding of those archaeological congresses that took place on the territory of Ukraine.

Valuable for our research are the memories of N. D. Polonska-Vasylenko, an archaeologist, historian, secretary of the Kyiv Archaeological Institute (Polonska-Vasylenko, 2011).

The researcher covers in detail the process of the formation of the Ukrainian scientific centre at the end of the 19th – in the first half of the 20th century, describes the activities and composition of students of the Kyiv Higher Women's Courses (she was a graduate of these courses), characterizes the educational process, and gives an assessment of the teachers. Concerning women's courses, the researcher describes in detail composition of students and assesses the manner of conducting lectures, behaviour, and abilities of teachers. In the memoirs, V. E. Kozlovska, who was a friend of N. D. Polonska for a long time, is mentioned many times.

P. S. Uvarova and N. D. Polonska-Vasilenko wrote memoirs in exile many years after the relevant events.

"Selected memories" ("Selected Memories") of S.Y. Witte, a famous Russian statesman of the pre-revolutionary era, were studied (Vitte, 1960).

In the memoirs of S. Y. Witte, we found a lot of evidence about the origin, family status, and family life of Y. F. Abaza (nee Stubbe). Y. F. Abaza was at one time a famous singer, and public figure, collected rarities and was fond of archeological excavations, which became fashionable at that time. Y. F. Abaz explored settlements of the Trypillia culture and collected many valuable artifacts, which were demonstrated at many Archaeological Congresses. In the memoirs of S. Y. Witte, we found a lot of evidence about the origin, family status, and family life of Y. F. Abaza.

An important source of our publication is scientific sources, one of the types of narrative written sources, which is represented by the scientific works of women archaeologists (reviews, notes, scientific articles, etc.).

For example, texts written personally by K. M. Melnyk-Antonovych are stored in the Central State Historical Archive of Ukraine in Kyiv in the personal fund of V. B. Antonovych (CSHAUK, f. 832, d. 1, c. 167).

The report of research in the Volyn province, the article “Archaeological Researches of 1925 in Kremenchuchyna”, which describes all the materials found, was studied.

The Historical and Cultural Atlas of Russian History, compiled by N. D. Polonskaya-Vasilenko and edited by M. V. Dovnar-Zapolskyi in 1913 – 1914, has been preserved. It consists of 3 volumes. The first volume is devoted to non-Slavic and Slavic antiquities (Dovnar-Zapolskyi, 1914), the second – to Moscow and South-Western Russ (Dovnar-Zapolskyi, 1914), the third covers the Peter era, the reign of Catherine II, the 19th century (Dovnar-Zapolskyi, 1914).

According to the content of the work by N. D. Polonska-Vasylenko, it is a lecture-illustrated course on archeology, which the researcher was going to teach at the Kyiv University of St. Volodymyr.

The majority of sources of this group are stored in the personal funds of the Scientific Archive of the Institute of Archaeology. For example, in the personal fund of M. I. Vyazmitina, the researcher’s reviews of the work of I. V. Fabricius “An attempt to analyze some Scythian images”, the collection “Archaeology”, the works of A. P. Ivanova “Sculpture and Iconography of the Bosphorus” and “Problems of the Bosphorus” were found art, article by A. I. Furmanska “Bronze Crafts of Olbia”, etc. (SAIA NASU, f. 34).

The work of the well-known archeologist of that time A. I. Terenozhkin’s “On Theoretical Direction in the Works of I. V. Fabricius” is preserved in the personal fund of P. P. Yefimenko (SAIA NASU, f. 67, c. 9), in which the author analyses the researcher’s scientific works devoted to the study of Scythian culture.

**The Conclusions.** Thus, the researched source base is representative and diverse. It fully allows us to reveal the peculiarities of the process of women’s entry into archaeological science at the time under study; can be used when writing prosopographic scientific works dedicated to individual figures of famous female archaeologists of the specified period.

The typological and species classification of sources was used as the most appropriate and optimal considering the specifics of the sources. This classification made it possible to establish the features of each type of document, their scientific value. The source base on the researched topic consists mainly of sources of a personal origin and clerical documentation.

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**AGRICULTURAL EDUCATIONAL INSTITUTIONS OF STEPPE TAVRIYA  
OF THE END OF THE 19th AND THE BEGINNING OF THE 20th CENTURIES**

**Abstract.** *The development of agrarian education in the southern Ukrainian region is still among the understudied topics, since there has not been done a comprehensive and sufficiently complete study nowadays, and the available researches are fragmentary and leave a significant number of gaps to the historical studies. The purpose of the research is to highlight the agricultural education formation of the Ukrainian peasantry in Steppe Tavriya, to determine the role of educational institutions of an agricultural profile in the education system of the region. The methodology of the research is based on a positivist approach to the reconstruction of the historical past using special historical methods: chronological, systematic, and historical comparative. The scientific novelty of the article consists in the coverage of the pre-Soviet history of an agricultural education of the Ukrainian peasantry of Steppe Tavriya through the prism of educational institutions establishment, their financing, the formation of*

ideas about student and teacher teams, which testified to the peasant nature of agricultural education in the region. **The Conclusions.** The local self-government bodies and private initiative played a key role in the development of educational institutions of an agrarian profile in the lands of Steppe Tavriya. Owing to their energy on the turn of the 19th and 20th centuries two leading agricultural schools appeared, which trained agricultural specialists until the beginning of the 21st century – the Obitochenska and the Lukianivska lower agricultural schools of the 1st category. These schools can be called “peasant” schools, because 2/3 of their student contingent consisted of peasants from surrounding counties, who wanted to escape from the shackles of not large plots of land and hopelessness. Free education, availability of scholarship programmes for a full board and the support of local patrons attracted even the poorest peasant youth to study there. On the other hand, the requirement to study agricultural science, a large share of a practical component in education, working in the field without days off led to the fact that only a third completed their studies (25% of the entrants of the Lukianivska school, and 39% of the Obitochenska school).

**Key words:** agricultural education, Tavriya gubernia, agricultural school, education of peasants, professional education, agriculture.

### СІЛЬСЬКОГОСПОДАРСЬКІ НАВЧАЛЬНІ ЗАКЛАДИ СТЕПОВОЇ ТАВРІЇ кінця XIX – початку XX ст.<sup>1</sup>

**Анотація.** Розвиток аграрної освіти у південноукраїнському регіоні продовжує залишатися у колі маловивчених тем, оскільки до сьогодні комплексного й достатньо повного дослідження так і не створено, а наявні праці фрагментарні та залишають по собі значну кількість лакун для історичних досліджень. **Мета дослідження** полягає у висвітленні становлення аграрної освіти українського селянства у Степовій Таврії, визначенні ролі закладів освіти сільськогосподарського профілю у системі освіти регіону. **Методологічне підґрунтя** роботи становить позитивістський підхід до реконструкції історичного минулого з використанням спеціально-історичних методів: хронологічного, системного та історико-порівняльного. **Наукова новизна** статті полягає у висвітленні дорадянської історії сільськогосподарської освіти українського селянства Степової Таврії через призму становлення закладів освіти, їх фінансування, формування уявлення про учнівський і вчительський колективи, що засвідчило селянський характер аграрної освіти регіону. **Висновки.** У розвитку на землях Степової Таврії закладів освіти аграрного профілю ключову роль відіграли органи місцевого самоврядування та приватна ініціатива. Завдяки їх енергії на межі XIX – XX ст. постало дві провідні сільськогосподарські школи, які готували фахівців-аграріїв до початку XXI ст. – Обіточенська та Лук'янівська нижчі сільськогосподарські школи I розряду. Їх, по праву, можна назвати “селянськими”, адже 2/3 учнівського контингенту склали селяни із навколишніх повітів, що бажали вирватися з тенет малоземелля та безнадійності. Безкоштовне навчання, наявність стипендіальних програм для повного пансіону і підтримка місцевих меценатів приваблювали до навчання навіть найбільшій селянську молодь. З іншого боку – вимога навчання аграрної науки, велика частка у навчанні практичної складової, праця у полі без вихідних приводила до того, що лише третина учнів завершували навчання (25 % від вступників Лук'янівської школи, і 39 % – Обіточенської).

**Ключові слова:** аграрна освіта, Таврійська губернія, сільськогосподарська школа, освіта селян, професійна освіта, сільське господарство.

**The Problem Statement.** The shameful defeat in the Crimean War and reformist trends in higher circles led to the fact that more and more educated people of the Russian Empire began to mention the situation of the peasantry and, as a result, its educational level. In the central and regional press the publications raised the issue of the “necessity of teaching agriculture”, and the educational level of the peasantry was related to productivity and prosperity of the country directly (V...skii, 1859, February 28).

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<sup>1</sup> The study was prepared based on the results of fundamental research “The Socio-cultural Space of Ukraine in the Second Half of the Nineteenth – First Third of the Twentieth Century: the Peasant-centric Dimension” (state registration number: 0123U101600) with the support of the Ministry of Education and Science of Ukraine.

Unfortunately, despite the relevance of the spread of agricultural education for the southern Ukrainian rural population, conversations in the progressive environment of Tavriya hubernia did not take on a real meaning. As of 1901, in the steppes of Tavriya (the so-called “northern povits” – Berdiansky, Melitopolsky, and Dniprovsky) there were only two educational institutions of an agricultural profile – the Lukianivska and Obitochenska lower agricultural schools. In December of 1902, the Povit Committees in Tavriya hubernia highlighted the importance of establishing a network of lower agricultural schools with various specializations. The Committees suggested having at least one school per povit, and preferably per volost, “in such a quantity that all the youth could pass the agricultural training” (Trudy, 1903, pp. 22–23, 43).

There emerged two more German lower agricultural schools of the 1st category on the territory of Tavriya in the village of Eigenfeld of Melitopol Povit: a men’s school (1907) and a women’s school of agriculture and home economics (1909), but they were national and focused on the German-speaking peasantry. There were courses of gardening, horticulture, viticulture and beekeeping at the Preslav Teacher’s Seminary (the village of Preslav, Berdiansky povit) and they were also of an agrarian profile. Although the courses contributed to the spread of agrarian knowledge, they were of a nature of advanced training for future teachers, who could teach agriculture courses at general public schools.

Hence, the research objective is to determine the factors that led to the development of agricultural education in the region and examine the outcomes of educational institutions using the example of two schools that provided agricultural knowledge specifically to the Ukrainian peasantry – the Lukianivska and Obitochenska lower agricultural schools.

**The Review of Recent Researches and Publications.** The study of the development of agricultural education in the territories of Ukrainian hubernias began at the end of the 19th century and continues to this day. Owing to the application of new material, delving into the issue within a narrow chronological and geographical field, it was possible to understand both positive and negative aspects of agricultural educational institutions formation. Hence, the modern interest in the issue could be explained.

In recent decades, there appeared a number of thorough researches, which to one degree or another affect the field of agricultural education. In modern historiography one of the first to study this issue was Serhii Uliukaiev, who revealed the pedagogical content of educational process in lower agricultural educational institutions of the Ukrainian hubernias in 1883 – 1916 (Uliukaiev, 1994). Mykhailo Honchar’s thesis is also devoted to the pedagogical issues of lower professional educational institutions (including the agrarian direction) within the boundaries of Southern Ukraine (Honchar, 2015). If the work of S. Uliukaiev is quite broad in terms of a geographical scope, then the study by M. Honchar covers a significant subject field of “professional education”, which led to the coverage fragmentation of the above-mentioned issue.

Separate aspects of the studied issue were covered in publications written by O. Volos and Ya. Berezniak (the role of zemstvo in the agricultural education’s formation in southern Ukrainian hubernias), (Berezniak, 2013; Berezniak, 2017; Volos, 2000), I. Mironova (covered agrarian education of the peasantry), (Mironova, 2021), O. Trygub and Yu. Stepanchuk (covered the agricultural educational institutions of Kherson and Podillia hubernias), (Trygub, 2023; Trygub & Stepanchuk, 2024), O. Trygub, S. Dehtyarev and V. Parkhomenko (dealt with the analysis of the professional education development in Ukraine and the teaching staff of educational institutions) (Trygub, Degtyarev & Parkhomenko, 2023a, 2023b; Trygub & Degtyarev).

In 2019, the Russian scholar Yuriy Chudnovets defended his dissertation on the topic “Formation and Development of the Agricultural Education System of Tavriya Hubernia in

the 19th – at the beginning of the 20th Centuries”), (Chudnovets, 2019), which, would seem, should have put an end to the study of this topic, or significantly fill this gap. Instead, the dissertation was written at a rather low level due to a review of the research text. Only one section was devoted to the educational institutions directly (Chudnovets, 2019, pp. 138–205), and the history of agricultural schools of steppe Tavriya was one and a half dozen pages (Chudnovets, 2019, pp. 187–204), based on several reports for 1910 – 12, which are kept in the Russian State Historical Archive. The role of the author was reduced to an abstract presentation of the specified reports without any generalizations, analysis and dynamics, which only proved the introduction of several documents into scientific circulation.

**The purpose** of the research is to reveal the agricultural education formation of the Ukrainian peasantry in Steppe Tavriya, to determine the role of educational institutions of an agricultural profile in the education system of the region, to characterize their student and teaching contingents.

**The Source Base of the Research.** The original sources are considered to be the reports of educational institutions (Otchet, 1906 – 1911), the resolutions, decisions and reports of the hubernia and povit zemstvo of Tavrian hubernia (Otchet, 1905; Po voprosu, 1899; Postanovleniia, 1908; 1910; 1914), the reference publications of Tavrian hubernia (Adres-kalendar, 1902; Pamiatnaia knizhka, 1915; Trudy, 1903), the reporting and statistical collections of the Department of Agriculture of the Main Department of Land Development and Agriculture of the Russian Empire (Ezhegodnik, 1908; Kratkie statisticheskie svedeniia, 1913 – 1915; Smeta dokhodov i raskhodov, 1896; Smeta dokhodov, 1910; 1912; 1916) etc. The materials of the periodical press, where we came across mentions and impressions about the agricultural schools, are of an auxiliary nature (V...skii, 1859, February 28; Yug, 1911, May 28).

**The Results of the Research.** Although the Ukrainian lands were agrarian predominantly, improving the professional education of agrarians was not a priority for the imperial authorities at the beginning of the 19th century. Against the backdrop of a rapid formation of capitalist relations among the leading countries of Western Europe, the Russian Empire, which included most of the Ukrainian lands, continued to remain an economically backward commodity-type country with preserved serfdom of a feudal nature. It is clear that the average Ukrainian landowner did not care much about the agricultural education of his own serfs, relying on the knowledge of administrator.

Instead, there were made several attempts to establish educational institutions of an agrarian profile in the southern Ukrainian hubernias. The very first attempt is the School of Practical Agriculture for the resettled peasants in the village of Bohoiavlenske (Vitovka) within the boundaries of the modern city of Mykolaiv, headed by Professor of Agriculture Mykhailo Livanov (1751 – 1800). But the School of Practical Agriculture in the village of Bohoiavlenske did not operate for a long period. In 1797, the school moved to the village of Charlevo (Pavlovsk) near St. Petersburg, where it operated only until 1803 (Vergunov, 2017, pp. 93–95).

A rapid development of the lands given by the Tsar and the construction of luxurious estates in the Black Sea-Azov region led to a significant shortage of gardeners, who would create park areas at the estates and take care of them. In addition, the construction of huge palace complexes of the Tsar family representatives and the highest aristocracy began in the coastal zone – families of Vorontsov, Golitsyn, Yusupov, Mordvinov, etc. First, in 1817, a school of horticulture was founded in Katerynoslav (closed in 1869), in 1828 – the Maharach School of Viticulture and Winemaking in the Crimea, in 1844 – the Odesa School of Horticulture, which was relocated to Uman in 1859. Hence, it was impossible to create any training system for farmers in the region.

The establishment of several agricultural institutions in the area was primarily driven by the reforms undertaken in the 1860s and 70s, which aimed to transform the region into

a land of commercial agriculture, thereby promoting productivity growth. First of all, the understanding was observed among the circle of large landowners, who put pressure on the state apparatus and local public. Only in the last quarter of the 19th – at the beginning of the 20th century a package of normative acts appeared, which were designed to form a certain system of agricultural education: “Regulations on the Agricultural Schools” (1878), “Normal Regulations on Lower Agricultural Schools” (1883), “Regulations on Agricultural Education” (1904) (Trygub, 2023, pp. 73–75).

Practically, local communities (represented by zemstvos and societies) and private individuals were the ones, to whom belonged the entire initiative to establish agricultural educational institutions. The state participation in this process consisted in the formation of a regulatory and legal framework, financial support, work on planning and organization of control over the activities of agricultural schools.

In 1896, the Obitochne lower agricultural school (from 1911 – Obitochne lower agricultural school of the 1st category) was established in Tavriya lands in the village of Obitochne of Berdiansk povit. The opening of the school took place on November 1 at the initiative of Berdiansk Zemstvo, which allocated 218 desiatyn of state land for the school (Otchet, 1910b, p. 2). A farm occupied 170 desiatyn of land, where horses, sheep, cows, pigs were bred, agricultural experiments were conducted, beekeeping was studied, etc. The school had a garden, a vineyard, a vegetable garden, a weather station, craft workshops for various types of crafts, a library (Semenov-Tian-Shanskii, 1910, p. 620; Ezhegodnik, 1908, p. 767).

The school activity goal was declared to be “spreading among the people the basic knowledge of agriculture”, with specialization in agriculture – gardening, horticulture, viticulture, cattle breeding and beekeeping, and crafts – metalwork, blacksmithing, carpentry, wheelwrighting and cooperage.

At school the course of study lasted four years, the first of which was preparatory, where literacy and general education subjects were taught. The classes were divided into practical and theoretical. The class-room theoretical lessons were held during winter period from September 20 to March 20. During the summer period, practical classes consisted in work on school plot of land, but no more than 8 hours per day. During the winter period, practical classes were held exclusively in workshops where fans, frame beehives, and seed drills were made. There were even orders by peasants regarding the purchase and repair of agricultural tools (Berezniak, 2013, p. 78; Berezniak, 2017, p. 55).

The school financing was mixed and was carried out both at the expense of the zemstvo, private donations and profits from the farm, and the state treasury. The estimate for the maintenance of the school was approved annually and increased from the treasury from 3,000 rubles in 1897 to 10,000 rubles in 1917 (Smeta dokhodov i raskhodov, 1896, appendix 33, p. 2; Smeta dokhodov, 1916, appendix 24, p. 29). The increase in state expenditures took place in 1911 in connection with the transformation of the school on August 9, 1912 into a college (Smeta dokhodov, 1910, appendix 21, p. 195).

In fact, the treasury allocated 5,000 rubles more and, therefore, in general – 8 and 15 thousand rubles in accordance. The additional funds were 25-30 state scholarships from the capital of the southern Russian settlers for the Bulgarian population of Berdiansk povit and Melitopol povit (Otchet, 1910b, p. 2). The state also helped in case of force majeure, as happened in 1911, when there was a need to allocate 6,000 rubles for reconstruction of buildings and restoration of individual buildings damaged by fire on February 28, 1910. Funds were sent in the form of aid to the Berdiansk Zemstvo, which provided 11,000 rubles for the reconstruction of the school (Smeta dokhodov, 1910, appendix 34, p. 233). During the

audit in 1912, it was indicated that the school repair after the fire cost more than 30,000 rubles (Chudnovets, 2019, p. 195).

The financing by the local zemstvo, which was unchanged until 1917, was 7,950 rubles and contained 33½ scholarships for residents of Berdiansk Povit. Private income and profit from economic activity fluctuated constantly and in different years amounted to: 1909 – 7,036 rubles, 1912 – 1,309 rubles, 1913 – 5,787 rubles, 1914 – 4,639 rubles povit (Otchet, 1910b, p. 22; Smeta dokhodov, 1912, appendix 26, p. 244; *Kratkie statisticheskie svedeniia*, 1914, p. 10; *Kratkie statisticheskie svedeniia*, 1915, p. 12). In case of excess amounts, they went to a special account and were directed to the material development of the school – improvement of the premises, development of the economy, purchase of teaching aids and other needs.

The school accepted young men aged 13 and above to study. In order to enter the preparatory class the following was necessary: knowledge of general education subjects was required in the scope of primary public schools, for 1st grade – in the scope of two-class rural schools. A general dynamics of students from the year of the first graduation – 1902, can be seen in Table 1.

Table 1

**Dynamics of Students of the Obitochne Agricultural School/College in 1902 – 1914.**  
(*Otchet*, 1905, pp. 237–238; *Otchet*, 1910b, pp. 5–6; Chudnovets, 2019, p. 188;  
*Kratkie statisticheskie svedeniia*, 1913, pp. 68–69; *Kratkie statisticheskie svedeniia*,  
1914, pp. 74–75; *Kratkie statisticheskie svedeniia*, 1915, pp. 80–81)

Years	1902-05	1909	1910	1911	1912	1913	1914
Number of students	60	63	67	59	72	81	79
Number of admitted students	appr. 20 per year	20	n.d.	n.d.	25	18	26
Number of applications	60	71	n.d.	n.d.	129	113	118
Out of them:							
peasants	n.d.	43	45	n.d.	65	70	61
others	n.d.	20	22	n.d.	7	11	18
Children:							
farmers	n.d.	51	n.d.	n.d.	65	69	63
others	n.d.	12	n.d.	n.d.	7	12	16
Graduation	62	11	10	10	8	3	17

The main contingent of students (2/3) was the local peasantry between the ages of 15 and 20, and the other part was the burghers and other people, who had completed the general education course of a one-class village or parish school of literacy. During 15 years, 309 young men entered the educational institution.

There were graduated 121 specialists in agriculture, who graduated from the educational institution on January 1, 1915, the following graduates: 18 – run their own business, 32 – served in the agricultural sector, 20 – became the employees of educational institutions, 11 – changed professions, 12 – were in the army, 6 – died, 22 – there was no information (*Kratkie statisticheskie svedeniia*, 1915, p. 81). At the same time, some graduates raised their educational level, enrolling further in other educational institutions at different times. Since we do not operate with exact data, we can assume that one of them could be the Kherson Secondary Agricultural School, whose graduates had wider opportunities for employment.

One of the pressing issues of the Obitochne Agricultural School was the employment of graduates. In 1905, the report on the inspection of agricultural schools in the Northern Azov region noted that “ $\frac{1}{2}$  of the graduates go to work as village teachers,  $\frac{1}{4}$  – as assistants on private farms,  $\frac{1}{6}$  – entered secondary agricultural schools, and the rest received various positions”. And only the surrounding population, “observing the cultivation of the soil on the school land and the results obtained from this cultivation, which were expressed in significantly higher yields, compared to the local routine management of the economy, begins to use other methods in their farms” (Otchet, 1905, p. 238).

The Head of the school, Andronik Ivanovych Yusipenko noted that the purpose of the school was to “spread among people the basic knowledge in the field of agriculture”, “exists by itself, and the school – by itself”, because “it is observed that the schools do not directly serve the peasant economy, but train clerks, assistant managers, senior supervisors and other servants for private farms” in his report to Berdiansk Povit Zemstvo Administration dated September 11, 1910 (Yusipenko, 1910, p. 1). The Obitochne’s school was no exception, because “its graduates, in most cases, do not go to their village, but settle somewhere on the side” and, thus, “the school does not have a strong influence on the peasant economy” (Yusipenko, 1910, p. 2).

The speaker saw the reason for this in the fact that children of small-land peasants mostly studied at school, and there were very few children of large-land owners, who were called “the Tavrychans” in the Azov region, and they did not change the situation with improving the agrarian education of the peasantry in the region by their own management.

Taking into account the employment statistics, Zemstvo officials began to express the idea of the need to train folk teachers for rural areas on the basis of an agricultural school. Such teachers could be very useful for the village, setting up apiaries, gardens and orchards at the folk schools, conducting readings and conversations with the peasantry on agricultural topics. As a result, Berdiansk Zemstvo took a course to transform the Obitochne Agricultural School into a school with a pedagogical class (Yusipenko, 1910, pp. 4–5). On July 1, 1911, the school acquired a new status of a lower agricultural school and new opportunities opened up for the graduates in the pedagogical field in the system of public schools (Chudnovets, 2019, p. 191).

The school’s teaching staff remained largely unchanged until its transformation, when a teacher was added to the pedagogical class. If in 1902 there were only 5 teachers in the staff: the Head of the school V. M. Pavlikov; the teachers – H. V. Kucherovsky, K. A. Mikhaylovsky, D. V. Perepyliuk and the legislator, the priest P. Dziubenko, (Adres-kalendar, 1902, p. 141), then in 1915 there were 6 people in the staff: the Head of the school D. V. Perepeliuk, the legal scholar, the priest O. Kosharnovsky; the teachers – V. H. Kucherovsky, V. A. Zorchenko, S. O. Diachenko and D. V. Khronusov (Pamiatnaia knizhka, 1915, p. 106).

The teaching staff can be characterized using the example of the 1909-10 academic year. The Head of the school was an official of the VIII class, a personal honorary citizen Vasyl Maksymovych Pavlikov, who stayed in this position for less than 15 years (1896 – 1910). On December 10, 1896 he was appointed for organizational preparation for the official opening of the school. The Head of the school had a rather good, for that time, level of professional education – in 1885 he graduated from the Moscow Agricultural School of the 1st category and pedagogical courses at Kharkiv Agricultural School in 1896.

During the period of 1910 – 1912, Andronik Ivanovych Yusipenko temporarily performed the duties of the managing head of the school. In 1912, Dmytro Vasyliovych Perepeliuk was appointed the head of the school, a secretary, who began his teaching career at the Obitochne School on September 22, 1901 as a teacher of special subjects. He had a professional education diploma and in 1899 he finished the Kherson Agricultural Secondary School, and in 1900 attended pedagogical courses at the Kharkiv Agricultural School.

Another teacher of special subjects – Pavlo Petrovych Danilevsky also received an education diploma at the Kherson Agricultural School (1903). He worked at the Obitochne’s School in 1909 – 1912.



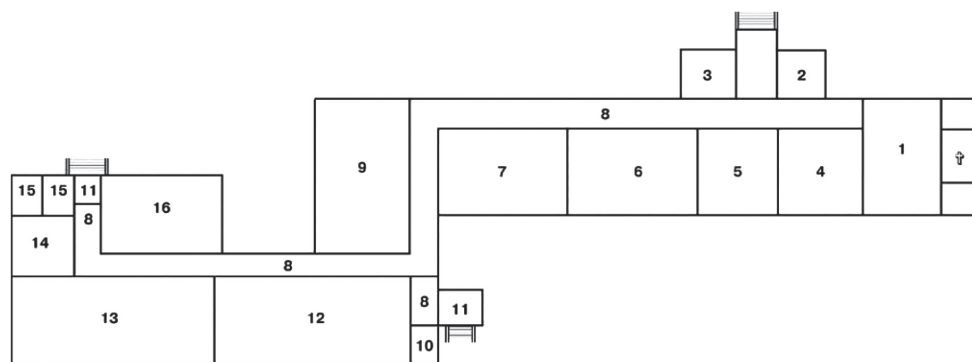
General education subjects were taught by the court councilor Vasyl Hryhorovych Kucherovsky, who had a theological education diploma, graduating in 1885 from the Chernihiv Theological Seminary. Arriving at the school on December 2, 1902, he worked until 1917 (approximately), simultaneously performing the duty of a librarian.

Legislators were, as a rule, local priests with a seminary education.

To ensure practical classes and economic activities, the school employed hired workers: a teacher of horticulture, a workshop manager, a blacksmith and locksmith craftsman, a clerk, a doctor, a paramedic, a messenger and a herdsman. Thus, in 1909, a teacher of Horticulture was Dmytro Volodymyrovych Khronusov, who finished the Tsarist Slavic School of Horticulture and the Heisenheim Institute of Pomology (classes at the Heisenheim Institute of Horticulture on the Rhine were attended by gardeners from the Russian Empire to improve their qualifications and study Horticulture). The head of the workshops – Zahariy Stepanovych Bezruchenko went to the Nohai Crafts School (Otchet, 1910b, pp. 3–4).

Thus, we can see that the school had a sufficiently powerful teaching staff, the majority of teachers had a professional education diploma and improved their qualifications at pedagogical courses. At the same time, the educational institution can be called a peasant school, since the overwhelming majority of students represented the peasantry and later they returned to agricultural labour.

*The Lukian's lower agricultural school of the 1st category (since 1910 – the Lukian's lower agricultural school of the 1st category with two pedagogical classes) was established in the Kakhovka Volost of the Dnipro Povit. The school was founded on January 8, 1900, on the initiative of a local peasant-landowner Lukian Yermiyovych Pavlenko, who in 1895 – 1904 donated all his property to the Dnipro Povit zemstvo: 670 decares of land with a homestead, 100,000 rubles and movable property for 250 thousand rubles (Berezniak, 2017, pp. 55–56)<sup>2</sup>. During the period of 1895 – 1899, the patron personally managed the construction and arrangement of the school (Fig. 1), the zemstvo prepared and registered the statute, and its official opening took place on October 15, 1900 (Po voprosu, 1899; Otchet, 1909, p. 1).*



**Fig. 1. Scheme of the building of Lukian's Lower Agricultural School of the 1st grade (Honchar, 2015, p. 294)**

**1. Church; 2. Physics office; 3. Library and teacher's room; 4–7. Educational class-rooms; 8. Corridor; 9. Assembly hall; 10. Washroom; 11. Corridor; 12–13. Bedrooms; 14. Medical office; 15. Service premises; 16. Zeichhaus**

<sup>2</sup> Ya. Berezniak also points out that after the death of the founder, the school was bequeathed another 170 des. and capital. Instead, the total amount of land in 670 des. and the fact of addition is not indicated anywhere. Including in the source indicated by the author.

The school grounds included: a homestead, a threshing floor, an orchard, a vineyard, a paddock, a nursery, a research field and a park area. The majority of the land – 598 des. – was set aside for arable land. At the same time, the school cultivated only a part (in 1909 – 144 dec., 1910 – 280, etc.), and the rest of the land was leased to small-land peasants at a price of 15 rubles for a des. (Otchet, 1910a, p. 10; Otchet, 1911, p. 10), which should have given a constant profit in the amount of 5–6 thousand rubles. In fact, not all the land found a tenant, and the rent received fluctuated significantly from year to year, yielding, on average, 5,000 rubles of profit.

At school there was perhaps the best material and technical base among agricultural educational institutions not only in the Tavriya province, but also in the South of Ukraine in general. In 1910, the dead inventory included a steam thresher, “Ideal” sorting machine, “Clayton” corn thresher, “Elvorti” planters, “Planet cultivators, plows, harrows, and many others. Three pairs of Ukrainian oxen, 29 horses (17 of them working horses) were used in the work. Pupils engaged in dairy farming (33 cows, a bull and 2 bulls), pig farming (15 animals), beekeeping (Otchet, 1911, pp. 14–18, 31). The school had its own meteorological station, craft workshops for various types of crafts, a library, a bathhouse, and even a church, which was built together with the school building on the initiative of L. E. Pavlenko.

The main goal of the school, according to the statute and “Regulations” of 1883, was to spread basic knowledge in agriculture in general and sericulture among the agricultural population of the povit, mainly through practical classes, viticulture, horticulture, livestock and beekeeping in particular; and also by crafts: blacksmithing, carpentry, wheelwright and cooper (Berezniak, 2017, p. 56). At the same time, the founders of the school and the drafter of the statute, probably anticipating the future problem of returning graduates to agricultural labour, declared the main goal to be the requirement that students who finished school returned back “to their agricultural, mostly peasant environment, i.e. to their societies and villages, and there, by a personal labour, they would spread the correct understanding of various branches of agriculture”. After completing the school course, each student must work for one year in some third-party farm for a fee determined by an agreement between the school authorities and the owner of the estate. Interns were required to send reports on their actions and observations to the school every four months; the reports were certified by the owner, who provided his comments as needed (Otchet, 1911, pp. 2–3).

The course of study at the school lasted three to four years and, in terms of curriculum, basically corresponded to the generally accepted for lower-type agricultural educational institutions. A feature of the educational process was a one-year internship, since only after the internship report, a graduate received a diploma of graduation. Therefore, at the Lukian’s school the practical side of training was given primary importance, which was not always positively assessed by both examiners and the public. For example, the Commission of the Tavriya Provincial Zemstvo, which visited the school in 1905, noted: “Numerous school management representatives distract the school from its educational purpose and pursue almost exclusively economic interests. Due to this, the main focus of the school economy is not on giving more material to the student, but on getting more profit from the estate... There is no research field in the school... and, thus, at the Lukian’s school, students do not see a rational economy, but see a typical local economy, from which little can be learned” (Otchet, 1905, pp. 244–245).

After 6 years, a contributor to the “Yug” newspaper noted with sadness: “11 years passed... what a result the school made during its existence. Two folk teachers and a hundred illiterate attendants or senior workers at landlord estates.

During my visit to the Lukian's village school, I was impressed by the endurance of the students... They work from the beginning of spring field work until September 1. Finally, the long-awaited time for classes is coming. Classes are held from 8 a.m. in the morning until 12 o'clock; and work again in the afternoon. I ask, will learning be beneficial when all the forces are spent on physical labour, which mercilessly exploits the student's forces?

God insulted the Lukianivska school and the composition of teachers: while in other villages and towns at schools, teachers have a higher or secondary education diploma, here they have a lower one, and it is not surprising that teachers read even elementary scientific information from textbooks at the lessons... School economy brings income. Maintenance fees are received correctly, students work more than they should (14 instead of 8 hours)" (Yug, 1911, May 28, p. 3). And if one can still agree with the author about the emphasis on labour in the educational process, then the criticism of the teaching staff is clearly exaggerated, since, as will be shown below, it was not particularly different from other agricultural schools in the region.

The main source of funding for the Lukian's school was its own economic activity, private income and student maintenance fees (scholarships and own funds), and only  $\frac{1}{3}$  of the income was aid from the Dnipro Povit Zemstvo. Unlike many other agricultural schools, the Lukian's school did not receive funding from the treasury until 1914, when it was reorganized into a college.

Initially, expenses for maintaining the school amounted to 10,000 rubles, of which 6,000 were the profit from L. Pavlenko's donation, and 3,000 were the annual contribution of the poviat zemstvo. In addition, during the first 5 years, the Tavriya provincial zemstvo allocated 1,000 rubles (Po voprosu, 1899, pp. 590–592). In 1905, the estimate for the school maintenance was approved in the amount of 16,510 rubles, of which the Dnipro Zemstvo provided 3,820 rubles, the scholarship fund (3 named scholarships for 16 people) – 1,920 rubles, rent for 170 des. – 2550 rubles, sale of crops – 6,000 rubles, sale of water from school wells – 500 rubles, other – 1,720 rubles. In fact, the school received appropriations and profits for 23,101 rubles (Otchet, 1906, pp. 71, 73). At the same time, it should be taken into account that this amount was not constant and fluctuated depending on the success of farming and yield.

In 1914, the school was reorganized into a college and began to receive funding from the state treasury. In 1914 the total estimate was 50,579 rubles, of which: state funding – 7357 rubles (in the future – 10,000 rubles annually), zemstvo – 8,520, own income, scholarship fund, payment for a boarding house and private donations – 34,702 rubles (Kratkie statisticheskie svedeniia, 1915, pp. 12–13). Thus, we may state that the school actually turned into a profitable agricultural enterprise, which could maintain a high level of material and technical support of the educational institution with its own funds and spend only on the maintenance of boarders 13,542 rubles (Kratkie statisticheskie svedeniia, 1915, pp. 13).

Young men of all ages were admitted to go to school, at least 13 years old – up to the preparatory class, and 14 years old – the first. Education at school was free, and according to maintenance, students were divided into scholarship holders and self-paid students (at their own expense, which amounted to 120 rubles per year). As a rule, 90% of students were scholarship holders (for example, on July 1, 1907, 38 scholarship holders and 2 private (Postanovleniia, 1908, p. 421), i.e. only 5%). In total, the school operated 5 scholarship programmes for 41 people: Emperor Alexander II – 10, Tsarevych Alexey Nikolaevich scholarship programme – 5, O. M. Kolchanova scholarship programme – 1,

L. Pavlenko scholarship programme (per % of capital) – 5, school scholarship programme – 20 (Postanovleniia, 1910, p. 748). The availability of these programmes made it possible to get not only free education, but also full board.

During the first decade, an average of 40 people went to school (see Table 2), and already in the second decade, during the period of 1911 – 1913, the number of students increased to almost 100 people. The sharp increase in students not only prompted the reconstruction of the school buildings to increase the space for teachers and students, but also the school transformation into a school with a two-year teaching class (the decision of the Zemstvo dated September 26, 1913) (Postanovleniia, 1914, pp. 577–583).

Table 2

**Dynamics of students of the Lukian's Agricultural School in 1904-1914.**  
(*Otchet, 1905, pp. 243; Otchet, 1906, pp. 2, 51; Otchet, 1907, pp. 5–6; Otchet, 1908, pp. 5, 38–39; Otchet, 1909, pp. 5, 50–51; Otchet, 1910a, pp. 5, 66–67; Otchet, 1911, p. 5; Kratkie statisticheskie svedeniia, 1913, pp. 74–75; Kratkie statisticheskie svedeniia, 1914, pp. 80–81; Kratkie statisticheskie svedeniia, 1915, pp. 80–81*)

Years	1904	1905	1906	1907	1908	1909	1910	1912	1913	1914
Number of students	37	39	38	32	39	44	47	89	87	95
Number of admitted students			15	19	13	11	17	44	19	46
Of them:										
peasants	n.d.	28	27	26	31	31	n.d.	62	58	70
other	n.d.	11	11	6	8	13	n.d.	27	29	25
Graduates	11	4	8	–	6	7	7	8	6	20

The main contingent of students (2/3) was the local peasantry of the Dnipro and Melitopol povits of the Tavriya province (78%) aged 14 to 19, and the rest – burghers and other different social classes, who completed the general education course of the Zemstvo national school or church parish school (other educational institutions make up less than 10%. It is interesting that some students came not only from the neighbouring provinces – Kherson, Katerynoslav, but also from distant regions – Grodno, Novgorod, Smolensk gubernia (*Otchet, 1906, pp. 51–52; Otchet, 1908, pp. 38–39*).

During the period of 15 years, 311 young men entered the Lukian's Agricultural School (college). As of January 1, 1915, there were graduates: only 78 specialists in agriculture (25%), of whom: 2 were engaged in their own farming, 60 – worked in the agricultural sector, 2 – employees of educational institutions, 5 – changed their profession, 3 – served in the army, 2 – died, 4 – continued their studies at other educational institutions (*Kratkie statisticheskie svedeniia, 1915, p. 81*). Thus, we can see that the description of the employment of graduates given to the school by the correspondent of the *Yug newspaper* in 1911 was quite true, because  $\frac{3}{4}$  of the graduates worked as attendants and supervisors in landlord farms.

Thus, for example, of those who finished school in January of 1905 (the second graduation), there were 4 people: 1 remained at the Lukian's school, 1 returned to his own farm, as he was from a wealthy family, 2 were looked for a job. That is why, the commission concluded that “a general phenomenon is repeated at the Lukian's school: graduates do not return directly to the environment which they have left” (*Otchet, 1905, p. 244*), and looking for a job in some other places.

We believe that this phenomenon can be explained in the same way as in the case of the Obitochne school, because even at the Lukian's school, an even greater part of the students were from peasants with little plots of land, and they had, in fact, nowhere to return, because they did not have their own farms. That is why, having knowledge and management skills, young farmers did not spread their knowledge, but worked in the farms of large estates.

The teaching staff of the school corresponded to the level of lower agricultural schools and consisted of 5–6 people and additional hired practice teachers. In the first five years of the school, a rather powerful team was formed, which consisted of the head of the school, I. I. Schmidt and the teachers: V. E. Hromeko, M. P. Derkach, F. F. Danylenko and T. V. Hrek, f. O. Popov, and practice teachers I. V. Balan and V. S. Shevchenko.

The head of the school, Ivan Ivanovych Schmidt (1904 – 1918), replaced the school's founder Lukian Pavlenko on July 1, 1904, and worked at school from the very beginning, teaching special subjects. I. I. Schmidt had a higher university diploma (Piga Polytechnic Institute) and an agronomist of the 1st grade.

A teacher of special subjects, a hereditary nobleman Volodymyr Yevhenovych Hromeko (1901 – 1907) had a professional education diploma of the Uman College of Agriculture and Horticulture, and additionally he completed pedagogical courses at the Kharkiv Agricultural College. Before beginning his teaching activities at the Lukianivska school (September 10, 1901), he was in charge of a research field in a private estate in the Kharkiv province and was an experienced practicing agronomist. Another teacher of special subjects – personal honorary citizen Makariy Panteleymonovych Derkach graduated from the Kherson Agricultural College and worked until July 1, 1904 in the Akkerman District Land Administration (Bessarabia Province). Since 1907, Volodymyr Yosyfovych Maslov (1907 – 1918), a graduate from the Kherson Agricultural College and pedagogical courses at the Kharkiv Agricultural College, had been a teacher of special subjects.

In 1901 – 1905, general education subjects were taught by the former teacher of the Oleshky Zemstvo National School, a graduate of the Kherson Teacher's Seminary, Fedir Fedotovych Danylenko, who came from the peasantry and owing to his own efforts he became a teacher. He was replaced by Terentii Vasyliovych Hrek, who graduated from the Bayramche Teacher's Seminary (Akkerman District of the Bessarabian Province) and worked for only two years (1905 – 1907), teaching also in the preparatory class. For only one year (1907 – 1908), a hereditary honorary citizen Mykola Mykhailovych Rylsky, who had a theological education diploma (Odessa Theological Seminary), taught general subjects. In 1908, Heorhy Oleksiiovych Maidachenko, who also graduated from the Bairamche Teacher's Seminary and had experience as a public teacher in Bessarabia, started working at school. It is interesting that for the first five years (1901 – 1906) the Law of God was taught by the local priest Oleksandr Popov, and later this subject was taught by M. P. Derkach, who had no theological education diploma.

Teachers-gardeners, blacksmith and carpentry masters worked at school to conduct practical classes and economic activities. At different times, the educational process was provided by gardeners: Ivan Vlasovych Balan (Nikitske School of Winemaking), Volodymyr Yevhenovych Bernard (Nikitske School of Winemaking and Practice Abroad), Franz Ivanovych Studnichka (studied in Austria), Kostiantyn Ivanovych Vasiliev (Penza School of Horticulture) and the others.

Masters were practitioners who did not have any professional education diploma, but gained practical experience at enterprises, in the army, in private farms: Vasyl Semenovych

Shevchenko, a blacksmith and locksmith master, Onisym Vasyliovych Ryaboshlyk, a carpentry master, Oleksiy Ivanovych Malikov, a blacksmith, Matviy Zakharovych Taran, a blacksmith and the others (Otchet, 1906, pp. 36–39; Otchet, 1907, pp. 36–39; Otchet, 1908, pp. 24–27; Otchet, 1909, pp. 37–40; Otchet, 1910, pp. 50–53).

Thus, we can see that at school there was a sufficiently powerful teaching staff, whereand all full-time teachers had a professional education diploma and improved their qualifications at pedagogical courses. Instead, we observe a rather significant staff turnover among teachers of general education subjects and practicing teachers. The reasons for this phenomenon are not known for sure and require further scientific research, but we can assume that it was related to difficult living conditions in rural areas or insufficient financial support, because zemstvo and rural teachers received less money than in towns. Although the majority of employees of the Lukian's school, both theory and practice teachers, received additional payments – managing workshops, keeping office books, managing the school economy and office, teaching additional subjects, etc. Therefore, the issue of personnel turnover remains open.

**The Conclusions.** Local self-government bodies and a private initiative played a key role in the development of educational institutions of an agrarian profile in the lands of Steppe Tavriya. Owing to their efforts at the end of the 19th and the beginning of 20th centuries two leading agricultural schools were established, which trained agricultural specialists until the beginning of the 21st century – the Obitoche's and Lukian's lower agricultural schools of the 1st grade, which in the second decade were transformed into schools with the right to train teachers of rural folk schools.

These schools can rightly be called “peasant”, because 2/3 of their student contingent consisted of peasants from the surrounding counties, who wanted to escape from the shackles of little land and hopelessness. Free education, availability of scholarship programmes for full board and the support of local patrons attracted even the poorest peasant youth to study. On the other hand, the requirement to study agricultural science, a large share of a practical component in education, working in the field without days off led to the fact that only a third completed their studies (25% of the entrants of the Lukian's school, and 39% of the Obitoche's school).

On the other hand, despite all the shortcomings of these educational institutions, they initiated the agricultural education system formation of the Ukrainian peasantry, which was transformed into a modern system of training specialists in the agricultural sector, which is strategically important for the Ukrainian statehood and its economy.

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**FORMATION OF A NEW MODEL OF RATIONAL AGRICULTURE  
MANAGEMENT BY YEVHEN CHYKALENKO**

**Abstract.** *The purpose of the research is to elucidate a personal experience of an efficient agriculture management by Yevhen Chykalenko based on the advanced technologies of the industrial relations organization at the time and conveying it to rural agriculturiers. The research methodology is based on a scientific basis with the application of the following research principles: historical reliability, objectivity, systematicity, scientific comprehensiveness, complexity, multifactoriality. The following research methods have been applied: general scientific – analytical, synthetic and logical; historical – problem chronological, comparative historical, historical genetic, retrospective and periodization; interdisciplinary – structural systemic, source and terminological analysis. The goal achievement was due to a complex use of the research principles and methods in combination with sources. The Scientific Novelty. On the basis of the involved array of sources and newly discovered publications, the application of current methodological approaches, the system of factors that formed*

Yevhen Chykalenko as a multifaceted personality has been highlighted; the periods of life that consistently formed his national consciousness have been researched. There have been determined the reasons for Yevhen Chykalenko's search of a new model of agriculture management, its transformation into a highly profitable one. Emphasis has been put on his activity in the Ukrainian agriculture general development. **The Conclusions.** Due to the study on Yevhen Chykalenko's formation of a new model of a rational agricultural management, it was possible to spot an extraordinary personality in many activities. Our idea is the following: his reformation of an agricultural activity in the economy and introduction into labour and economic relations of the share management set him apart from the mass of landowners, he is not accepted as a typical landowner, since the estate was managed by a specially trained manager. *Prykazhchyky* (a hired employee who supervised some part of a farm, performed various economic tasks or managed the farm) in their turn, provided a daily communication with the peasants tenants of the land. Earned money in agriculture was spent on public affairs, charity, publishing and journalistic activities, cultural promotion (in Ger. – Kulturträger) in agriculture.

**Key words:** Yevhen Chykalenko, agriculture, rational management, landowners.

## ФОРМУВАННЯ ЄВГЕНОМ ЧИКАЛЕНКОМ НОВОЇ МОДЕЛІ РАЦІОНАЛЬНОГО ГОСПОДАРЮВАННЯ НА ЗЕМЛІ

**Анотація.** **Мета дослідження** – розкриття особистого досвіду успішного ведення сільського господарства Євгеном Чикаленком на основі тогочасних передових технологій організації виробничих відносин та донесення його до загалу сільських товаровиробників. **Методологія дослідження** ґрунтована на науковій основі із застосуванням таких принципів: історичної достовірності, об'єктивності, системності, наукової всебічності, комплексності, багатofакторності. А також методів дослідження: загальнонаукових – аналітичного, синтетичного та логічного; історичних – проблемно-хронологічного, порівняльно-історичного, історико-генетичного, ретроспективного та періодизації; міждисциплінарних – структурно-системного; застосовано також джерелознавчий та термінологічний аналіз. Комплексне використання принципів і методів досліджень у поєднанні із джерелами забезпечило досягнення поставленої мети. **Наукова новизна.** На основі залученого масиву джерел і нововиявлених публікацій, застосування актуальних методологічних підходів розкрито систему чинників, які формували Євгена Чикаленка як багатогранну особистість; досліджено періоди життя, що послідовно формували його національну свідомість. Встановлено причини пошуку Євгеном Чикаленком нової моделі управління господарством, трансформування його у високорентабельне. Наголошено на його культуртрегерській діяльності для загального розвитку українського сільського господарства. **Висновки.** Дослідження формування Євгеном Чикаленком нової моделі раціонального господарювання уможливило побачити непересічну особистість у багатьох іпостасях. Наше уявлення про реформування ним господарської діяльності в економії та введення до трудових й економічних відносини іспольного (дольового) господарювання виокремлює його з-поміж масиву землевласників, зумовило сприйняття як нетипового поміщика, оскільки помістям керував спеціально підготовлений управитель. Прикажчики, зі свого боку, забезпечували повсякденне спілкування із селянами-орендарями землі. Зароблені економією кошти витрачав на громадські справи, благодійництво, плекання української культури та слова, видавничу і публіцистичну діяльність, культуртрегерство у сільському господарстві.

**Ключові слова:** Євген Чикаленко, сільське господарство, раціональне господарювання, землевласники.

**The Problem Statement.** Due to the reception of Yevhen Kharlampiyovych Chykalenko (1861 – 1929) as the awakener of the Ukrainian nation, a chief focus is on the activity of a renowned personality. The main analysis regarding his self-realization in various roles focused on the following: Yevhen Chykalenko as a famous author of currently published diaries. The issue of agriculture management, animal breeding, horticulture and other types of agriculture is less covered. Hence, the study on his intellectual achievements regarding

organization and management of agricultural production, formation of a system of a rational land use, understanding and publication of the obtained results, their spread among a wide range of agricultural producers is considered as a problem statement, to the same extent as popularization of a rational agriculture management.

**The Review of Recent Researches.** In our opinion, the most complete Yevhen Chykalenko's activity was researched by a renowned scholar I. M. Starovoitenko, who noted the following: "The beginning of Yevhen Chykalenko's public activity dates back to the end of the 19th century, which was facilitated by the move to Odesa in 1894 and joining the Ukrainian "Hromada" there. Yevhen Chykalenko supported "Kyivska Staryna" – the only magazine that published the Ukrainian belles-letters at the time, he stood up for the editor's initiative to announce a contest for writing the history of Ukraine and financed this event, and he also began popularization activities: published his illustrated books in Ukrainian – "Rozmovy Pro Silske Hospodarstvo" (Conversations on Rural Agriculture)" (Starovoitenko, 2009, p. 8). In Volume 10 of the Encyclopedia of the History of Ukraine, there is information about Yevhen Chykalenko as the author of "Rozmov Pro Silske Hospodarstvo" in fact, the cycle of 5 books of an agrarian nature was called "Rozmovy Pro Silske Khaziaistvo" (Conversations on Rural Agriculture). In addition, a rational agriculture provided the conditions for Yevhen Chykalenko's publishing and philanthropic status (Havryliuk, 2013, p. 550). Yu. O. Boiko did the research on Yevhen Chykalenko's publishing, charitable and public political activities, the following was indicated in the study: "Yevhen Chykalenko's Works" on agronomy (Conversations on Rural Agriculture), Black Fallow and Crop Rotation; Livestock: Horses, Cattle, Pigs and Sheep; Sown Herbs, Corn and Beets; Grape". But the 5th book "Garden" was not included in the list (Boiko, 2008, p. 16). In D. Chorny's publication "Yevhen Chykalenko and Kharkiv: History of Relations", in our opinion, the statement that Kharkiv "...remained neutral..." for him is controversial. First of all, Yevhen Chykalenko, being a member of the Drahomanivtsi Group, was forever imbued with the idea and spirit of service to Ukraine, its acquisition of own statehood... (Chorny, 2021, p. 39). Yevhen Chykalenko's contribution to the development of agriculture in Ukraine was studied by M. Rohozha (Rohozha, 2018). It should be also mentioned that there are other publications related to the article issue indirectly (Sviashchenko, 2020).

**The purpose of the research** is to elucidate a personal experience of efficient agriculture of Yevhen Chykalenko based on the advanced technologies of the industrial relations organization at the time and to convey it to rural producers.

**The Results of the Research.** In modern history of Ukraine the figure of Yevhen Kharlampiyovych Chykalenko is multidimensional and multifaceted in the context of his personal qualities realization in the matter of a public service to people, and not the least – in awakening the Ukrainian people consciousness.

The entire family structure of the Chykalenko family contributed to the formation of Yevhen's understanding of a genetic belonging to Ukraine, its history, culture, customs, and faith. His family originated from Poltava steppe region, but for various reasons his ancestors emigrated and moved to the territory of Southern Ukraine. Since childhood Yevhen knew "... that his grandfather, Ivan Hodorozhiy-Chykalenko, was born in Zaporozhzhia zymivnyk (a winter house) on the Saksahan River at the end of the 18th century, later on the above-mentioned territory belonged to Katerynoslav Governorate. His father, Mykhailo, was killed by the Muscovites, perhaps during the liquidation of Sich in 1775. When Tsarina Catherine II presented the land to Count Kankryn on which Chykalenko's great-grandfather's zymivnyk

(a winter house) was located, Chykalenko's great-grandmother moved to Kherson region with her children, where the government allocated land for settlement to the Zaporozhtsi and their families (Doroshenko, 1934, p. 11).

As a young man, Yevhen's grandfather Ivan began his service "... as a Cossack in the Buh Cossack Army, which was formed by the tsarist government from the former Zaporozhtsi in 1784. He rose to the rank of an "official" (pidkhorunzhy), because he did not want to move to Kuban... in the village of Pereshory (Ananyiv povit) he married the daughter of a local landowner... and took her dowry of 150 acres of land (Doroshenko, 1934, p. 11).

The given information gave all the grounds to claim that Yevhen Chykalenko had deep Ukrainian left- and right-bank roots as a unity, introduced into the agricultural background, the foundation of which was laid by his grandfather in Kherson region. One more conclusion should be drawn from Yevhen Chykalenko's genealogy field: "The grandfather enjoyed much respect among the local population, both pany (landowners) and peasants, he was invariably a tytar in Pereshory church for many years, and until the end of his life he came to church in a blue Cossack zhupan (a coat)" (Doroshenko, 1934, pp. 11–12). Pondering over the above-mentioned facts, we should emphasize that this step of a grandfather Ivan laid the first bricks for the foundation of a long process of the Ukrainian nation awakening, and later his son Kharlampiy, and later his grandson Yevhen will bring it to a high level.

Furthermore, we would like to mention the following: "Ivan Chykalenko, having taught his two sons Petro and Kharlampiy to read and write well, helped them start serving in Ananiiv District Court, where they earned the right to nobility" (Doroshenko, 1934, p. 12). In our opinion, it was about personal nobility, in particular, of Yevhen Chykalenko's father. It was received by public servants for impeccable civil service and necessary amount years of service.

Yevhen, a son of Kharlampiy Chykalenko was born on December 9, (December 21 n.s.) 1861 in the family estate in the village of Pereshory.

An in-depth acquaintance with Yevhen Chykalenko's biography (before he was enrolled in studies at Kharkiv University), gives grounds to claim that he went through several periods in his development. In our opinion, it is impossible to understand the phenomenon of his Ukrainization, and hence his Ukrainian-centricity without a thorough analysis of the periods.

The first period is childhood, when due to difficult family circumstances, children, especially "...the boys, lived freely, without special care and affection of the elders, but lived in abundance and in the bosom of the luxurious steppe nature, looking closely at the husbandry, agricultural work, and the life of shepherds among the wide free steppe" (Doroshenko, 1934, p. 12). The second period is studying at Odesa boarding house of Randal, an Englishman. And then a problem occurred, it turned out that a nine-year-old Yevhen "... can only speak the "muzhytska" language well, i.e. the Ukrainian language, that is why, he became ... the object of mockery by the teaching staff and friends" (Doroshenko, 1934, p. 12). The owner of the boarding house changed only three years later, which ensured it the status of a private progymnasium. The teaching staff changed significantly. A philologist and historian Oleksiy Andriivsky, a geographer Petro Nishchynsky and Leonid Smiliansky (an ardent Ukrainian patriot) started to work at a private progymnasium. His father died in 1871, a year later, so Yevhen stopped going to Pereshory for Christmas and Easter holidays. The Sokolovsky family of the Director of the progymnasium took care of him. In this environment, the boy read the poetry written by Taras Shevchenko, the prose by Marko Vovchok (Maria Vilinska), "Taras Bulba" by M. V. Hohol. The third period was the process of inclusion in the national culture. Petro Chykalenko, his uncle, took Yevhen away from Odesa after two years of studying at

the progymnasium, when he was already a student of the 4th grade and in September of 1875 he sent Yevhen to a real school (college) in Yelysavetgrad (nowadays – Kropyvnytsky). It should be mentioned that the real school (college) was maintained by the local zemstvo. According to the statute approved in 1871, the main task of the real school (college) was to give graduates knowledge in the scope of secondary education for admission to higher special educational institutions. But a paramount achievement of the third period was that Yevhen fitted in the environment naturally. Andrii Hrabenko became his classmate, Panas Tobilevych (Saksahansky) shared the same desk with him; a friendly communication with whom contributed to getting to know the brothers: Ivan Tobilevych (Karpenko-Karyi) and Mykola Tobilevych (Sadovsky).

In our opinion, it is important to agree with D. Doroshenko's conclusion regarding the influence of educational and extracurricular environment on Yevhen Chykalenko during the period of studying in the real school (college) in Yelysavetgrad: "Chykalenko found himself in an environment that contributed to the transformation of his spontaneous Ukrainianness into a conscious national feeling in Yelysavetgrad" (Doroshenko, 1934, p. 14). And Doroshenko supported his opinion about the list of factors that contributed to the above-mentioned transformation: "In Yelysavetgrad, the Tobilevych brothers organized an amateur theatre group at the Public Club led by the elder Ivan (Karpenko-Karyi), which gave amateur performances on Saturdays for the benefit of poor students. As a director, the group invited Marko Kropyvnytsky, who lived in Yelysavetgrad at the time (Doroshenko, 1934, p. 15).

It should be highlighted that the milieu of the Ukrainian national intelligentsia had already produced a substantial layer of cultural and historical development based on the Ukrainian realities. Owing to the activities of the amateur group: "Chykalenko watched the plays "Nazar Stodolia", "Svatannia na Honcharivtsi", "Natalka-Poltavka", "Harkusha", "Dai sertsiu voliu zavede v nevoliu" (Give your heart freedom, it will lead you into slavery) (1863, 1873) (Doroshenko, 1934, p. 15). It should be noted that Marko Kropyvnytsky was not only the director of plays, but also the author of one of them – "Dai sertsiu voliu zavede v nevoliu" (1863, 1873) (Kropyvnytskyi, 2014, p. 538). The atmosphere that prevailed in the educational institution had its influence on Yevhen Chykalenko. "At the real school, although the lessons were conducted, as a rule, in the Russian language, there was not even a shadow of any hostile attitude towards Ukrainianism..." (Doroshenko, 1934, p. 15). The final touch was also found to explain the future commitment to the ideas and views of M. Drahomanov: "...a director Zavadsky, entering into conversations with older students on political issues and trying to dissuade them from sympathizing with extreme views, relied on the authority of M. Drahomanov as an opponent of terror" (Doroshenko, 1934, p. 15).

After Decree of 1876, the situation with the atmosphere of Ukrainianism worsened significantly, but the all-Russian radical, revolutionary (organizations "Narodna Volia", "Chorny Peredil") intensified...

However, Decree could not ruin the atmosphere of Ukrainianism as a whole. Yevhen continued his studies. "When visiting Karpenko-Kary, the boy would stay with him on Saturdays with a whole company, which consisted of the Ukrainians themselves, he would listen to good music and sing Ukrainian songs... and when he came to Pereshory, Chykalenko would read Shevchenko, Kulish, and Marko Vovchok to the boys in the yard on Sundays" (Doroshenko, 1943, p. 16). There are grounds to claim that the seeds of service to the enlightenment of the Ukrainian people germinated, which were received from the older generation, and thereby encouraged the young man to continue the idea of service to the people.

In 1878, another circle emerged in Yelysavetgrad, which was organized by Opanas Mykhalevych (1848 – 1925), who was exiled from Kyiv. In the past, he was a member of Kyiv “Hromada” (belonged to the circle of communication with Mykhailo Drahomanov and Dmytro Antonovych). In addition, the intellectual space of the circle included students-realists Andriy Hrabenko, Oleksandr Voloshyn Arkadiy Verzhbysky, Mykola Levtskyy, Mykhailo Vasilyev, Ivan Starynkevych as well as Chykalenko. M. Kropyvnytsky, I. Karpenko-Karyi, M. Sadovsky came to the meetings of the group. Yevhen Chykalenko noted the main thesis of the activities of the circle residents: “Regarding the independence of Ukraine, the sovereignty of its state life... there was no talk in the group, everyone thought only about how to achieve the freedom of the national development...” (Doroshenko, 1934, p. 17). A wise man, a doctor and public figure, O. Mykhalevych did not impose his own vision of the development of events on anyone, as he believed that everyone should choose work for the revival of the Ukrainian nation according to their understanding and abilities.

Finally, the fourth period, the final one in the social and personal development of the young man. It began in the spring of 1881, when Yevhen finished Yelysavetgrad real school (college). Taking into account Yevhen’s strong agricultural preferences, he made a decision to get a higher agronomic education first, and then to settle down in his ancestral place and engage in the business, which he knew and understood since childhood. Due to the absence of a specialized higher agronomic school in the Ukrainian lands at the time, Yevhen faced a challenge, in particular – where to study? He didn’t want to go to Moscow, as well as to Pulawy (Poland). Yevhen followed O. Mykhalevych’s advice and went to St. Volodymyr’s University in order to study natural sciences. But according to the statute, the graduates from the real school (college) were not allowed to enter St. Volodymyr’s University as undergraduates. Even V. Antonovych could not help, to whom he had a recommendation made by O. Mykhalevych (at the time of the appeal – Dean of the History and Philology Faculty of St. Volodymyr University, Doctor of Russian history). Owing to the failure with the enrollment, there was also a positive consequence – Yevhen got acquainted with the leading Ukrainian public figures – V. Antonovych and M. Lysenko, later on – with a historian D. Bahaliy, a statistician L. Padalka, O. Rusov, an ethnographer and linguist K. Mykhalchuk, a bibliographer and lexicologist M. Komarov.

In September of 1882, Yevhen overcame himself, he still went to Moscow and was admitted to Petrovsk Agricultural and Forestry Academy and began his studies. But there were student riots, as a result of which, the studies were suspended for an indefinite period of time. Therefore, he headed for Kharkiv, where he began studying as an undergraduate student at the Natural Science Department of a local university. He met his classmates from the real school there: Arkadiy Verzhbysky and Mykola Levytsky. During the educational process, Yevhen was noticed by Prof. A. Zaikevych, Head of the Agronomy Department. Professor realized that the student had a perfect command of the Ukrainian language, he instructed him to write a brochure on the corn (it was the first scientific work, unfortunately, not published, quite obviously, for censorship reasons). As you can imagine, the “first test” of the pen in the field of popularization of agricultural crops and their importance in the economic complex of the peasant husbandry initiated the process of imparting agricultural knowledge to the peasants.

Meanwhile, Yevhen entered a student life, in particular, the Ukrainian student community. There was an acquaintance with V. Maliovany among others, a Ukrainian close to “Narodna Volia”, who kept in touch with the Ukrainian National Movement, and, organizing a radical group of students, maintained relations with M. Drahomanov in exile.

In the same period of Yevhen's life, in particular: "...in 1883, he married ... Maria Viktorivna Sadyk, a panna-kursystka (a college student) from Lubny region" (Doroshenko, 1934, p. 21). But the family happiness had to withstand the test, the police were particularly interested in the activities of the group participants, and some of them were arrested. During the interrogation, one of the members of the group revealed not only Kharkiv Group, but also Yelysavetgrad Group led by O. Mykhalevych. The court decision regarding Ye. Chykalenko was the following: he was sent for five years under strict police supervision to the family estate in the village of Pereshory. Furthermore, the correspondence was prohibited, as well as unsupervised movement outside Pereshory, as well as there were weekly checks by a visiting policeman.

Taking into account the previous period of Ye. Chykalenko's life from the point of view of time, we should note that later on in his life he had a firm conviction in the need to immerse himself in the atmosphere of industrial relations in the village, seeing this as his culture carrier mission. At the same time, he knew, understood and was aware of an actual state of the Ukrainian affairs. Hence, he considered it a personal need to "awaken" the Ukrainian perspective, affirming belonging to Ukraine in the minds of ordinary people. Moreover, he had available forces and means at his disposal, to give them to this noble cause.

His powerful intellect was aimed at the direction of the activity owing to several factors: moved to live in Pereshory under the supervision of the police, took care of the family, economic concerns and industrial relations with the peasants. First of all, he set out to find out the reasons for low grain yields. The reason was dictated by a change in a traditional farming – a powerful transition from multi-disciplinary farming to highly specialized cultivation of grain for sale began. In addition, it was necessary to develop a different scheme of labour relations with the peasants as participants of the production process.

He characterized this event the following way: "In 1885, I inherited a manor house in the village of Pereshory, Ananyiv povit, in which a large landowner's husbandry was conducted, about 500 acres of land were cultivated with the help of hired peasants..." (Chykalenko, 1899, p. 793). The first year of estate management and the organization of harvest work made it possible to understand the needy situation of the peasants. The majority of them were not land owners, so they worked as hired workers, wages were set by the employer. In order to change their situation for the better, the following year Ye. Chykalenko reduced the grain wedge to save money, leased the freed part of it so that the peasants could cultivate and sow the leased areas independently. But in the fall, the expected result was not achieved due to the low cultivation culture, low-quality seed material and lack of moisture in the soil.

Yevhen Chykalenko obtained agronomic education externally at Kharkiv University, based on the analysis of the results of management, he began to search for an economically efficient model of the husbandry management, optimal in terms of labour organization. Therefore, next year Yevhen decided to introduce the principle of their personal material interest in the final results of work into the system of industrial relations with the peasants. He took several innovative steps in order to do this, it is worth thinking that he was the first to apply them in the South of Ukraine. Yevhen introduced share farming as since being a student, he had an instilled need to learn new trends in agriculture.

Later on, having reached a certain level of balanced relations with the tenant farmers and corresponding economic results, Ye. Chykalenko shared his personal experience on the pages of the periodical agricultural publications, popularizing it. "I gave my land to the peasants on an agricultural (share) basis for 1/3 of the harvest for the benefit of economy, and for



this management I established a crop rotation gradually: 1) par, 2) winter wheat, 3) corn, 4) potatoes, 5) sorghum, 6) barley and rye..." (Chikalenko, 1900, p. 107).

He took the next step in order to organize an efficient production. "The land given to the residents of Pereshory is divided into six plots or crop rotations of 120 acres each" (Chikalenko, 1900, p. 107). He took another step modelling the prospects of further relations with the tenants clearly. "On each of these plots, I have a small piece of land cultivated by husbandry forces..." (Chikalenko, 1900, p. 107). We are talking about a plot, as a model for imitation, hence culture improvement of land cultivating by peasants. Carrying on the reform of relations with the peasants he wrote the following: "Residents of the village Pereshory in the east choose 12 commissioners, each of them is assigned 60 dessiatyn (land measurement), 10 dessiatyn for each crop change; and the owners are grouped next to these representatives (2-5 households in each group), who distribute among themselves the same number of dessiatyn for each family" (Chikalenko, 1900, p. 107). The authors emphasized the fact that Ye. Chykalenko knew the peasants' psychology well: a self-respecting owner-tenant will not allow his plot to be worse than that of his neighbour's.

Then in the publication there was mentioned a personal responsibility of the authorized people. In the long run, by doing the above-mentioned, the sense of master was nurtured. "It is the duty of each commissioner to keep an eye on his companions, who cultivate the taken land as much as possible at the same time and in the same manner as it is done on a variable plot of husbandry; an authorized person monitors the quality of the seed grain and, if it is of a poor quality, husbandry exchanges it, if it is clogged, it is cleaned on husbandry sorter; he monitors gathering harvest in time, so that each polykipok (stook) has the same number of sheaves of the same volume..." (Chikalenko, 1900, p. 107). Then he went on to the technological methods of soil cultivation, the most important of them: "Plowing is carried out with our usual iron plows, peasant cattle, sowing and harvesting is done manually, and only winter wheat is sown with a row drill of husbandry under the guidance of an employee appointed to the husbandry" (Chikalenko, 1900, pp. 107–108). As Yevhen was well aware of the climatic conditions of Kherson area, he strongly recommended the optimal timing of work: "Plowing fallow is carried out at the end of March – at the beginning of April, i.e. immediately after the end of spring sowing" (Chikalenko, 1900, p. 108). It should be emphasized that Ye. Chykalenko had to overcome the inertia of ideas about the terms of spring field toil and rely on the support of those owners, who were able to accept innovations immediately.

It should be highlighted that the relationship between the peasants and the husbandry regarding the return of a share of harvest for rent was based on a mutual trust and control by the husbandry. "When all harvesters bring a share of savings to threshing machine or to skerries, after checking their harvest in the field by a prykazhchyk, they take it home; threshing is carried out by husbandry workers hired" (Chikalenko, 1900, p. 108). The Conclusion: "... owing to modern cultivation and crop rotation, in which grains are not sown by grain, but are sown in fallow, cornfield and threshing floor, the harvest is not less than 100 poods per dessiatyna, even in years like 96 and 99..." (Chikalenko, 1900, p. 108). And as a summary during the period of the field cycle of works: "... even in non-harvest years, by sharing (the land) for 1/3 of the harvest, I received about 30 poods from the dessiatyna; at the same time, the neighbours, renting the land for 2/5 and even for half, in those years had no more than 5 poods from the dessiatyna..." (Chikalenko, 1900, p. 108). "It is impossible to wish for better results and better relations than those that were established between the peasants and me after the introduction of the share farming" (Chikalenko, 1900, p. 108).

**The Conclusions.** Thus, in our opinion, transition to subsistence farming had two fundamentally important consequences. The first consequence, a solid economic foundation was created. It was the foundation, which allowed Yevhen Chykalenko to engage in charity work, to be a patron in the realm of the Ukrainian culture, a publisher, a publicist and a popularizer of agrarian knowledge. The second consequence, introducing him to the culture of agricultural production freed him from everyday worries and concerns, turning him into a public and political figure.

An active nature of Ye. Chykalenko, in connection with his Ukrainian centrism, demanded to share the experience of running not only grain farming. Therefore, on the basis of understanding his own experience, he prepared and published, overcoming the tsarist censorship, five books in which he described the culture of black fallow and the introduction of crop rotation as a countermeasure against droughts (Chykalenko, 1897, 32 p.), introduced other types of activities in animal husbandry (Chykalenko, 1899, 82 p.), regarding sown grasses as fodder for livestock (Chykalenko, 1900, 48 p.), viticulture (Chykalenko, 1901, 40), and horticulture (Chykalenko, 1901, 40 p.). The publication “How to Organize Agriculture in Field” deserves a special focus (Chykalenko, 1918, 15 p.).

The most complete and professional assessment of Ye. Chykalenko’s activities in the field of agriculture and formation of a new model of rational management was made by an agronomist V. Bertenson, an official of special assignments at the Ministry for Agriculture and State Property, a member of the Imperial Agricultural Society of Southern Russia. He emphasized the following: “The merit of Ye. Kh. Chykalenko is not that he applied improved methods of soil cultivation, not only that he introduced the importance of black fallow, etc., through the publication, he did more: he introduced these techniques for the agricultural culture of the local peasants” (Bertenson, 1900, p. 1552).

**The Prospects for the Further Research.** Taking into consideration the perspective of the field of rural studies, which is emphasized by the Ukrainian researchers (Prysiashniuk, 2018), the issue under research article needs further development. “Rozmovy Pro Silske Khaziaistvo” are seen as promising for further research. In our opinion, for the first time, they raised the issue of organic farming, preservation of moisture and humus in the surface layer of the soil, black fallow, crop rotation, plants as organic fertilizer. Extrapolating these issues to the present, it seems possible to trace transformational processes in soil science, agronomy, animal husbandry and other branches of agriculture.

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**THE PERIODICAL “RILLYA” (1910 – 1914) FOR SCIENTIFIC AND EDUCATIONAL AREA: CONTENT ANALYSIS**

**Abstract.** *The purpose of the research is to clarify the thematic content for the scientific and educational space on the pages of the Ukrainian-language agricultural illustrated periodical “Rillya” (1910 – 1914) at the beginning of the 20th century. The research methodology is based on the principles of historicism, objectivity and source studies methods, in particular the method of internal criticism of sources. There have been applied the methods of comparison of various publications related to the periodical “Rillya”, which have survived to our time and have been included in diverse publications being part of the agricultural periodical during different historical periods. Owing to the application of methodological tools, in particular, personalization, multifactoriality and interdependence of the historical and logical connection, the development of agricultural research in Ukraine has been*

highlighted at the beginning of the 20th century. **The Scientific Novelty.** The analysis of the Ukrainian-language periodical "Rillya" (1910 – 1914) as a historical source was carried out and the significance for the study of the history of agricultural science and education at the beginning of the 20th century was shown for the first time. **The Conclusions.** The Ukrainian-language agricultural illustrated periodical "Rillya" is an extremely valuable source for researching the scientific and educational space of Ukraine. The publications of the periodical can be divided into several thematic areas. One of the defining ones was the one that contained the author's publications about farming, cattle breeding, grass sowing, gardening, horticulture, beekeeping and other branches of agriculture. The key issues for farming were described in detail: "Wherewith and How to Fertilize a Field in Kyiv Region and Podillya", "Fodder Carrots in Winter", "Replanting of Winter Crops", "How to Clean Wheat From Slag", "Something About Weeds and the Fight Against Them" etc. The reasons for the decrease in the yield of agricultural crops and the deterioration of soil fertility have been singled out. It has been determined that a large part of the publications on the pages of the periodical "Rillya" were addressed to landowners and farmers, primarily agronomic assistance and legislative materials. There are a number of scholars known in Ukraine and in the world among the authors of scientific and practical texts (A. Ternychenko, P. Havsevych, V. Yavorskyi, Ye. Arkhyenko, M. Lutskevych, F. Kryzhanovskiy, Ye. Chykalenko, O. Yanata, etc.), who became a kind of link between science and production. Most of the information on the pages of the periodical "Rillya" was dedicated to societies, primarily agronomic. The areas of activity, the structure and peculiarities of the functioning of societies, their contribution to the popularization of agricultural knowledge and the development of scientific affairs in Ukraine were revealed at the beginning of the 20th century. It was found that the members of such associations were well-known public figures, philanthropists, publicists, agronomists, mostly enthusiasts. They promoted professional and fiction literature in their native language, national periodicals, and supported important Ukrainian initiatives. We consider the materials and notes devoted to the cooperation issues in the countryside to be valuable. The editors' focus was on issues of development and popularization of agricultural science and practice in foreign countries.

**Key words:** "Rillya" periodical, education, society, Ukrainian historiography, agriculture.

## ЧАСОПИС "РІЛЛЯ" (1910 – 1914) ДЛЯ НАУКОВО-ОСВІТНЬОГО ПРОСТОРУ: КОНТЕНТ-АНАЛІЗ

**Анотація.** Метою статті є з'ясування тематичного контенту для науково-освітнього простору на сторінках українського сільськогосподарського ілюстрованого часопису "Рілля" (1910 – 1914) на початку ХХ ст. **Методологія дослідження** ґрунтується на принципах історизму, об'єктивності та джерелознавчих методах, зокрема методі внутрішньої критики джерел. Використано методи зіставлення різних публікацій щодо часопису "Рілля", що збереглися до нашого часу і в різні історичні періоди були включені до різних видань, що були складовою сільськогосподарського журналу. Завдяки застосуванню методологічного інструментарію, зокрема персоналізації, багатфакторності та взаємозалежності зв'язку історичного і логічного, висвітлено становлення сільськогосподарської дослідної справи в Україні на початку ХХ ст. **Наукова новизна.** Уперше здійснено аналіз українського часопису "Рілля" (1910 – 1914) як історичного джерела, показано його значущість для дослідження історії сільськогосподарської науки, освіти на початку ХХ ст. **Висновки.** Україномовний сільськогосподарський ілюстрований часопис "Рілля" є надзвичайно цінним джерелом для дослідження науково-освітнього простору України. Публікації часопису можна поділити на декілька тематичних напрямів. Одним із визначальних був той, що вміщував авторські публікації про хліборобство, скотарство, травосіяння, садівництво, городництво, бджільництво та про інші галузі сільського господарства. Детально описуються ключові для ведення господарства питання: "Чим і як угноювати поле на Київщині і Поділлі", "Кормова морква зимою", "Пересів озимини", "Як чистити пишицю від сажки", "Дещо про бур'яни та боротьбу з ними" та ін. Розповідається про причини зниження урожайності сільськогосподарських культур, погіршення родючості ґрунтів. Встановлено, що велика частина публікацій на сторінках часопису "Рілля" була адресована землевласникам та хліборобам, насамперед ідеться про агрономічну допомогу та законодавчі матеріали. Серед авторів наукових, практичних текстів вказано

низку знаних в Україні й у світі вчених (А. Терниченко, П. Гавсевич, В. Яворський, С. Архипенко, М. Луцкевич, Ф. Крижановський, Є. Чикаленко, О. Яната та ін.), які стали своєрідною ланкою між наукою та виробництвом. Велика частина інформації на сторінках “Рілля” присвячена товариствам, насамперед агрономічним. Розкрито напрями їх діяльності, структуру і особливості функціонування, внесок у популяризацію сільськогосподарських знань та розвиток дослідної справи в Україні на початку ХХ ст. З’ясовано, що членами таких об’єднань були відомі громадські діячі, меценати, публіцисти, господарі-агрономи, в основному ентузіасти. Вони пропагували фахову й художню літературу рідною мовою, національну періодику, підтримували важливі українські ініціативи. Ціннісними вважаємо матеріали і замітки, присвячені проблематиці кооперації на селі. Увагу редакції привертало питання розвитку та популяризації сільськогосподарської аграрної науки і практики у зарубіжних країнах.

**Ключові слова:** часопис “Рілля”, просвітництво, товариство, українська історіографія, сільське господарство.

**The Problem Statement.** Agricultural periodicals occupy one of the most important places in the source base of the history of Ukraine. They are considered to be crucial factors in the popularization of practical achievements of agriculture, scientific achievements and ideas, as well as a powerful means of communication at the beginning of the 20th century. The agricultural periodical “Rillya” stands out among them, it was founded in 1910 and became the first Ukrainian-language publication in the Russian Empire dedicated to the needs of agriculture in Ukraine. The subject of the periodical was devoted to the coverage of the history of the peasantry in Ukraine, it covered the issues on the agrarian history of Ukraine, the science and practice of agriculture, horticulture, onion growing, fruit-growing, animal husbandry, beekeeping, entomology and other branches of agriculture. Actually the thematic array of the periodical “Rillya” needs careful study and qualitative analysis, in order ensure agricultural specialists and scholars in full, the correspondence of the thematic content to the international level, and the possibility of gaining authority in the world.

**The Review of Recent Research.** A historiographical analysis proves that there are no special studies of the analysed publication. The periodical was covered in the publications by V. Verhunov (Verhunov, 2005, 2012, 2022), I. Demuz (Demuz, 2014), A. Bilotserkivska (Bilotserkivska, 2010), O. Anikina (Anikina, 2014), I. Shandra, (Shandra, 2021), O. Kapralyuk (Kapralyuk, 2023), V. Chalavan (Chalavan, 2023) only fragmentary and, for the most part, in the context of examining the educational activities of individual personalities and societies. A. Zhyvotko noted the great popularity of the publication among the peasantry while analyzing the history of the Ukrainian press (Zhyvotko, 1999). O. Anikina in her research “Formation Factors of Agricultural Periodicals on the Ukrainian Territory” (Anikina, 2014) outlined the reasons for the emergence of such publications. I. Tkachenko and L. Matviichuk considered the key problems of the Ukrainian national press formation at the beginning of the 20th century on the basis of Mykhailo Hrushevskiy’s journalism, firstly publications in the popular weekly newspaper “Village” and materials of Yevhen Chykalenko’s diary (Tkachenko & Matviichuk, 2021).

A comprehensive historical and bibliographic study of the press of the pre-Soviet period was covered in the work “Periodical Publications of Kyiv (1835 – 1917): Index” (Volobueva et al., 2011).

It should be noted the significant number of scientific studies by A. Kobynets (Kobynets, 2001), I. Krupskiy (Krupskiy, 2007), R. Zagorulko (Zagorulko, 2012), M. Rogozha (Rogozha, 2018) were devoted to the periodicals, but their subject research was reduced to the disclosure of the national issue and the issue of the Ukrainian political movement as well as the cultural and educational one.

The studies on the agricultural periodicals remain isolated today. The informative potential of the Ukrainian-language publications of the beginning of the 20th century regarding the disclosure of the issues on popularizing the agricultural science and education development, especially among the peasants was little studied in recent historiography.

**The purpose of the research** is to clarify the thematic content for the scientific and educational space on the pages of the Ukrainian-language agricultural illustrated periodical "Rillya" (1910 – 1914) at the beginning of the 20th century. The object of the research is the materials of the publication "Rillya" and the reviews by the critics.

**The Results of the Research.** On November 1, 1910, the first Ukrainian-language agricultural periodical "Rillya" in the Russian Empire began to be published in Kyiv. The publication was distributed widely and had a great influence among the bread-growing peasants. Ye. Arkhipenko became its legal editor, although in fact it was A. Ternychenko, who became its legal editor from 1914. The periodical had already begun to work on the principle of the self-payment the next year.

The periodical's editorial and author team argued for the right of the Ukrainian people to the development and establishment of the nation persistently, in particular the development of agriculture, the spread of knowledge among the rural population, the development of the Ukrainian language, the study of history, and was aimed at the revival of the Ukrainian nation.

The existence of the periodical was mentioned in the "Commemorative Book of the Kyiv Province for 1911" (Pamyatnaya knyzhka, 1911, p. 232).

Leading Ukrainian scholars were responsible for the publication of the Ukrainian-language agricultural illustrated periodical "Rillya": A. Ternychenko, V. Yavorskyi, Ye. Arkhypenko, D. Kulachok, K. Polishchuk, M. Kalenychenko, M. Lutskevych, V. Pavlyuk, F. Kryzhanovskiy, Ye. Chykalenko, O. Yanata and others.

In general, more than 240 authors and correspondents, representing various scientific schools, took part in the publication of the periodical "Rillya" (1910 – 1914).

A. Nikovskyi, a public figure and statesman, a literary critic, a publicist, devoted an interesting mention to the periodical "Rillya", where he noted that the editorial board of the periodical, its office, and the editor of the publication A. Ternychenko, shared one small room. There were magazine boxes everywhere. There was a small table, a chair and a student bed in that room. A. Nikovsky equated A. Ternychenko's residence with an "ascetic's cell" and emphasized the "iron will" of the periodical editor (Zhyvotko, 1999).

The thematic headings under which the materials of the periodical's authors were published should be considered for a comprehensive vision of the structure of the Ukrainian-language agricultural illustrated periodical "Rillya" and it should be done to understand the grouping of information:

- Chronicle – the publications of an informative nature, which talk about current events (education, science, agricultural exhibitions, congresses, etc.) that were planned.
- Land affairs in Ukraine – the author's publications about farming, cattle breeding, grass sowing, horticulture, fruit-growing, beekeeping and other branches of agriculture.
- Agronomic advice – the author's publications-advice, agronomic assistance to landowners and farmers.
- Across Ukraine. The publications about agricultural and credit societies, courses, exhibition activity as a form of dissemination of agricultural knowledge for the development of contemporary agricultural education and science from agricultural science and practice.
- Contributions – essays, essays by authors contributing to the publication, etc.
- Notifications – notices about the price list of "Rillya" publishing house and other

publishing houses, addresses, the program of the specialized magazine, announcements, information on purchasing the magazine, etc.

We should note Ye. Chykalenko as one of the authors of the periodical, being also the manager at that time and an agronomist, who managed to collect high yields from small areas, since his piece of advice was in great demand among the population, in particular among the landowners and the farmers. One of these works is “Corn”, in which the author noted that the owners use corn grain in order to feed animals mostly, then send it to factories for distillation (a pood of corn produces three times more alcohol than a pood of potatoes and a one and a half times more than a pood of rye). In addition, starch and sugar were obtained from corn grain, which was used for various sweet cookies and for sprinkling dried fruits. Oil was also extracted from it. Therefore, according to the author, more attention should be paid to this culture (Chykalenko, 1912, pp. 104–107).

It should be noted that articles on the science and practice of agriculture were highlighted as a separate section. Thus, based on the analysis of field studies, A. Ternychenko indicated wherewith and how to fertilize the field to improve the fertility of the soils of Kyiv region and Podillia. The increase in the yield of agricultural crops depended not only on the type of fertilizers and the methods of their application, but also on the type of soil, crop rotation, and climatic conditions. It was noted that potash fertilizers were more effective on gray forest soils, and phosphorus fertilizers were more effective on chernozems (Ternychenko, 1912, pp. 71–73).

A. Ternychenko raised the issue of reseeding winter crops once again, because the farmers were increasingly concerned with wherewith and how to reseed an empty field in the spring. The author recommended resowing (if it turns out early in the spring that the winter crop has died) with ryegrass, barley or oats with age (Ternychenko, 1913, pp. 167–169).

P. Marenzha covered the cultivation of fodder herbs on the left bank of Ukraine in his author’s work. He stopped at sowing and caring for plants, paid attention to the varieties that were studied in the fields of the Uman Agricultural School. He noted that 80 fodder plants were sown on the experimental field (they were most often sown by the farmers) for 10 years. It turned out that there were not so many herb varieties that were resistant to summer drought and early frosts to survive the winter, and to be high-yielded, which was of the utmost importance. The author made a list of recommended fodder crops for the left-bank of Ukraine (Marenzha, 1913, pp. 262–264).

Much attention was paid to information on the collection and storage of plant products in peasant farms and cooperatives on the pages of the periodical “Rillya”. P. Horlenko outlined the importance of fodder carrots for animal husbandry. The carrots could be given to all animals and it was an irreplaceable product for the young animals. The pigs and poultry were also fattened with carrots. The author’s recommendation was to store fodder carrots in boxes, cellars, where it is dry and cool (Horlenko, 1914, pp. 103–105).

M. Lutskevych raised the issue of cleaning wheat from slag and recommended cleaning this crop with snow in the winter: when a pile of wheat was covered with snow, it was mixed and passed through a fan. The snow completely washed away the slag and the grain came out clean and shiny (Lutskevych, 1913, p. 147).

K. Miller carried on the column of the previous author and gave a word to the wise on combating the bread bug, first of all, he advised to destroy the testicles and pupae of the bread bug with the help of (double) plowing (Miller, 1913, p. 265).

O. Yanata was an agronomist and a botanist, who belonged to the galaxy of outstanding figures of Ukraine, raised the issue of weeds and their control. He noted that farming had



become the first occupation of a peasant. But it is known that although the Ukrainian lands are the best, unfortunately, bread yields remain low compared to other countries. The author gave some valuable recommendations for the fight against cereal weeds, in particular, to improve soil cultivation, to follow crop rotations with row crops, to destroy weeds before the seeds ripen, to clean the seed well, etc. He emphasized that separate departments of agronomist specialists will be formed in all regional large agricultural stations being created in Ukraine, which will deal with the issue of weed control (Yanata, 1913, pp. 362–364).

The peasantry, which made up 90 percent of the Ukrainian nation at the beginning of the 20th century, always dreamed of land. It was the "Rillya" periodical that was intended for the needs of the economy in Ukraine and often provided clarifications on government measures and resolutions. A. Ternychenko mentioned the "New Law on Financial Aid to Immigrants for Starting a Farm", in particular, on the list of preferential categories to whom loans were granted as "assistance without return" (Ternychenko, 1913, pp. 110–112).

Some of the articles raised the issue of assistance from the treasury for improving the economy. V. Yavorsky gave an explanation of the law, focusing on the peasant rights, and drew attention to the prescription. If it was proven that the loan was not used for the purpose, "land planning commissions" and "parish management" had the right to return the loan in full; acquaints the population with the laws approved by the tsar, adopted by the Duma, etc. (Yavorsky, 1913, p. 113).

At the beginning of the 20th century the cooperation in Ukraine was at a low level, so there was little practice. First of all, it was explained by the neglected state of the craft business. The rural population barely had enough to live on. Meanwhile, the peasant economy was changing, the landowners and the farmers sought to process their harvest so that it would be more useful and profitable. The publication "Crafts in Ukraine: Craft Unions or Artils" was valuable, where the author explained the formation of craft unions, stressing that there was still not enough practice and developed statutes in Ukraine, (mostly the craft groups and artils took the charters of the agricultural unions and revised them in their own way) etc. (Sylenko, 1913, pp. 115–117).

The "Prosvita" society had been an educational and economic organization on the territory of Galicia since the end of the 19th century. It had its branches (departments) in the villages. In this way, conversations were held on current topics, training courses on cooperation, reading rooms and cooperative shops were created. The demonstration fields, where experiments were conducted, were laid in the communities. Since 1910, all agronomic and economic activities (specialist agronomists, warehouses, agricultural publishing house) were transferred from "Prosvita" to the Galician society "Silskyi Hospodar". Agronomic assistance had significantly increased. In winter and autumn, training courses, readings and exhibitions were organized. In two years' term of operation, the "Silskyi Hospodar" society united 90 of its branches and 1,151 agricultural groups with 26,612 members. The credit cooperative societies developed in Galicia in parallel (Sylenko, 1914, pp. 53–57).

H. Sayenko shared his impressions of the agronomic readings that took place in Chernihiv region (Mutysy village, Krolevets District) in 1913. The organizer of this event was the regional zemstvo. Its task was to provide bread-growing peasants with agronomic recommendations, to acquaint them with the experience of other farms (Sayenko, 1913, p. 263).

The pages of the periodical had a significant amount of information about the courses. In particular, it is stated that the Uman School of Horticulture and Agriculture will hold free courses for peasants on agriculture lasting 10 months (Rillya, 1912, p. 103); "The Tiraspol Zemstvo decided to establish general education in 1913. Everyone, who wanted to learn

would be given a place and help. The Ministry of Education allocated more than 46,000 to schools in Tiraspol district” (Rillya, 1913, p. 70).

Since 1913 the periodical “Rillya” became the printed organ of the publishing company “Ukrayinskyi Ahronom”, founded on the initiative of A. Ternychenko with the aim of popularizing agricultural research and science among the rural population. In particular, thorough evidence was collected about the state of agriculture in the country, field experiments were planned and conducted, agronomic exhibitions were organized, active cooperation between industry associations was conducted, etc. (Ternychenko, 1913, pp. 230–231). The first general meeting of the newly formed society was held on February 21, 1913. The members of the society were well-known public figures, philanthropists, publicists, agronomists A. Ternychenko, Ye. Chykalenko, M. Prykhodko, P. Havsevych, S. Rozov, M. Bayer, Ye. Arkhynenko, M. Ivchenko, K. Osmak, P. Stebnytskyi, S. Gaevskiy, O. Krakivskiy and others.

Ye. Arkhynenko (one of the editors of the periodical) highlighted the issues of the beekeeping, care, maintenance, wintering of bees through the column “The Beekeeper’s Diary”, providing practical recommendations. The material of the article, which highlighted the methods of combating bee diseases, was interesting. Methods of treatment of an infectious disease rot were highlighted. It was how bee colonies could be preserved and their productivity improved (Prokopenko, 1913, pp. 50–52).

In order to popularize the Ukrainian periodicals, in particular the Ukrainian-language agricultural illustrated periodical “Rillya”, the editorial board printed the program of a specialized periodical with the headings “Reference Department”, “Notices”, “Subscriber Alerts”, “Address Directory”, “In Ukrainian Bookstores” (price list), as well as subscription terms. They offered additional “promotions” to encourage their subscribers. Thus, they promised “8 samples of good seeds and a wall report card calendar” in the first issue. The editorial board described the price policy and the possibility of posting information for landowners and farmers, noting that the subscriber could publish a 50-word notice free of charge, if the size was exceeded it would be a penny per word. The reference department provided addresses of the best farms, industrial and retail firms. Persons, who supply the Ukrainian farmers with seeds, livestock, poultry, tools, etc. were offered to submit their notices to the periodical “Rillya” for free (Rillya, 1910, Part 1).

It should be noted that the amount of advertising in the periodical “Rillya” was not large (2–3 pages), some issues printed several “Notices to Subscribers” with the content: I am asking for a job of a messenger or a clerk in a society, indicating nationality, marital status, region, etc.

The editorial board of the agricultural illustrated periodical “Rillya” promoted professional literature and in fiction the native language, national periodicals, supported important Ukrainian initiatives (in particular, “Donate to the Monument to T. Shevchenko in Kyiv”), spread the slogan “Yours to Yours!” etc.

The price list of the products of the publishing house “Rillya” was printed in the list of book novelties in the first place. Thus, part 24 contains the largest price list of the magazine, includes 13 authors of specialized literature (Ye. Chykalenko, V. Domanytskyi, A. Ternychenko, V. Koroliv, F. Nemolovskyi, etc.) and 14 writers in the “Cheap Rural Library” series (M. Hrushevskiy, I. Nechuy-Levytskyi, M. Kostomarov, T. Shevchenko, I. Franko, and others).

The reviews on the agricultural publications included interesting information. Thus, in 1912, the publishing house “Our Economy” published practical advice “The Garden at

the House”. D. Boronyla and the editorial board of the periodical “Rillya” note: the advice was “practical”, as the author called it, but this practicality, unfortunately, “was too much observed and the advice turned out to be too short, “rehearsal”. Because of this, of course, the systematicity of the exposition is lacking: there is nothing about crop rotation, little about cultivation and fertilization, individual crops are very vaguely described” (T.A., 1913, pp. 123–124).

It should be noted that informational and advertising material about the Ukrainian agronomic illustrated periodical “Rillya” could be found in other periodicals. In particular, the Ukrainian periodical “Dniprovi Khvyli” (1910 – 1913) had subscription terms for 1911 – 1912 (the second year of publication), which indicated the frequency, volume (with pictures), readership, price, and address. It was noted that the Ukrainian agronomists and the farmers were published in the journal, in addition to the scientific community. The subscribers would receive as a gift the twenty-fourth issue of the periodical “Rillya” with pictures, one book from the “Rillya” publishing house, two brochures on farming (Dniprovi khvyli, 1912, p. 19).

At the beginning of the 20th century, zemstvos paid special attention to the development of agriculture in the hubernias and povits, and conducted educational work among the peasants (Trygub, 2023; Romaniuk & Wisła, 2021). The agricultural exhibitions could be mentioned as the events contributing to the promotion of the agronomic knowledge and the modernization of agriculture.

The reviews on the agricultural exhibitions were published in the periodical “Rillya”, in particular, A. Ternychenko noted that the exhibition of agriculture and industry in Kyiv (1913) would be held until late autumn, and this was a great advantage, because more farmers and landowners would be able to visit it, and the participants would be able to declare themselves (Ternychenko, 1913, pp. 140–142).

The activity of the periodical was highly appreciated, in particular, at the autumn agricultural exhibition of 1913, which took place in Semenivka, Khorolsky District, the publishing house and periodical “Rillya” were awarded the highest award – a silver medal, and the Ukrainian books, brochures and the periodical were recognized as the best for the local farmers. In addition, in 1911, the periodical “Rillya” was awarded a silver medal at the agricultural exhibitions in Romny and a gold medal in Galicia (Zhyvotko, 1999, p. 221).

It should be emphasized that the editorial board of the periodical “Rillya” for a better and successful management of agriculture repeatedly focused on the agricultural congresses, so that the popular literature intended for peasants in Ukraine was written as clearly as possible, in the vernacular. This applied to all books, leaflets and articles in agricultural publications intended to raise special knowledge and a reasonable outlook among the Ukrainian bread-growing peasants.

In the periodical there was covered a wide range of issues. Separate materials highlighted the state of agriculture in Poland, Germany, England, the USA, and China.

In 1916 the tsarist government closed the Ukrainian-language business periodical “Rillya” using the Martial Law.

**The Conclusions.** The agricultural illustrated periodical “Rillya” was an extremely valuable source for researching the scientific and educational space of Ukraine. The publications of the periodical can be divided into several thematic areas. One of the defining ones was the one that contained the author’s publications about farming, cattle breeding, grass sowing, gardening, horticulture, beekeeping and other branches of agriculture. The key issues for farming were described in detail: “Wherewith and How to Fertilize a Field in Kyiv

Region and Podillya”, “Fodder Carrots in Winter”, “Replanting of Winter Crops”, “How to Clean Wheat From Slag”, “Something about Weeds and the Fight against Them” etc. The reasons for the decrease in the yield of agricultural crops and the deterioration of soil fertility were described. It was established that a large part of the publications on the pages of the periodical “Rillya” were addressed to the landowners and the farmers, primarily agronomic assistance and legislative materials. There are a number of scholars known in Ukraine and in the world among the authors of scientific and practical texts (A. Ternychenko, P. Havsevych, V. Yavorskyi, Ye. Arkhynpenko, M. Lutskevych, F. Kryzhanovskiy, Ye. Chykalenko, O. Yanata, etc.), who became a kind of link between science and production.

Most of the information on the pages of “Rillya” was dedicated to societies, primarily the agronomic ones. The areas of activity, the structure and peculiarities of the functioning of societies, their contribution to the popularization of agricultural knowledge and the development of research in Ukraine at the beginning of the 20th century were disclosed. It was established that the members of such associations were well-known public figures, philanthropists, publicists, agronomists, mostly enthusiasts. They promoted professional and fiction literature in their native language, national periodicals, and supported important Ukrainian initiatives.

It was found out that the “Ukrayinskyi Ahronom” society, created at the publishing of the “Rillya” periodical, acted on the principle of self-regulation, aimed at the development of agronomic science, professional agricultural education and literature, and also contributed to increasing the efficiency of the work of bread-growing peasants.

We consider the materials and notes devoted to the issues of cooperation in the countryside to be valuable. The editors’ attention was drawn to issues of development and popularization of agricultural agrarian science and practice in foreign countries.

The periodical’s participation in agricultural exhibitions was highlighted, where it was repeatedly awarded, in particular, in 1911 in Romny – with a silver medal, in Galicia – with a gold medal, and in 1913, the publishing house and periodical “Rillya” were awarded a silver medal, and the Ukrainian books, brochures and a magazine recognized as the best for local farmers.

M. Hrushevsky drew attention to the fact that statesmen underestimated the Ukrainian periodicals, which had great influence among landowners and farmers. The periodical “Rillya” served as a vivid example of this, which was very popular among various strata of the population at that time, and now it is a historical source of research on agricultural science and education of the beginning of the 20th century.

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**ENTRY TO WORLD WAR I: HISTORICAL TIME AND EVERYDAY ASPECTS  
(BASED ON THE MATERIALS OF ZHYTOMYR)**

**Abstract.** *The purpose of the research is a new historical and temporal interpretation of the problem of the society entry into World War I based on the analysis of an everyday life of Zhytomyr population. The research methodology is based on observance of scientific knowledge fundamental principles of dialectics and determinism and general scientific principles of historicism and objectivity made it possible to comprehensively consider the problem of city residents' reception of events and phenomena related to upcoming and beginning of World War I. Owing to the interdisciplinary approach, the peculiarities of a social behaviour of society under specific historical conditions have been elucidated. The application of a historical and genetic method made it possible to highlight the regularities of the city's population mood before and after August 1, 1914. The scientific novelty consists in the conceptualization issue of "entry into the war" using the example of the history of Zhytomyr before*

and at the beginning of World War I. **The Conclusions.** On August 1, 1914, the population of Zhytomyr faced a new objective reality – the beginning of World War I. The reaction of Zhytomyr population to this event corresponded to a standard behaviour of the society in similar circumstances: a strong emotional excitement that had signs of a collective psychosis, militant cheer-patriotism combined with panicked moods, an instinctive desire to stock up on basic necessities. At the same time, the analysis of the pre-war moods of the city's residents indicated a noticeable presence of the feeling of an inevitable upcoming war in their minds. That is, we can say that at that moment the war began to become part of reality, although still at the level of a subjective reception. In this context, the issue remains open regarding the completion of the process of society's entry into war, which, according to the authors, is defined by the time of society's adaptation to wartime, until it became an everyday norm. This necessitates a further research on the issue.

**Keywords:** World War I, Zhytomyr, everyday life, subjective reality, objective reality, mass consciousness, historical time.

## ВСТУП У ПЕРШУ СВІТОВУ ВІЙНУ: ІСТОРИКО-ЧАСОВИЙ ТА ПОВСЯКДЕННИЙ АСПЕКТИ (ЗА МАТЕРІАЛАМИ м. ЖИТОМИР)

*Анотація. Метою статті є нова історично-часова інтерпретація проблеми вступу соціуму в Першу світову війну на основі аналізу повсякденного життя населення Житомира. Методологія дослідження базується на дотриманні фундаментальних принципів наукового пізнання діалектики та детермінізму і загальнонаукових – історизму й об'єктивності, що дало можливість комплексно розглянути проблему сприйняття міськими жителями подій та явищ, пов'язаних з наближенням і початком Першої світової війни. Завдяки міждисциплінарному підходу розкрито особливості соціальної поведінки соціуму в конкретних історичних ситуаціях. Застосування історико-генетичного методу уможливило виявити закономірності настроїв населення міста напередодні та після 1 серпня 1914 р. Наукова новизна полягає у концептуалізації проблеми “вступу у війну” на прикладі історії Житомира напередодні та на початку Першої світової війни. Висновки. 1 серпня 1914 р. населення Житомира стикнулося з новою об'єктивною реальністю – початком Першої світової війни. Реакція житомирців на цю подію відповідала стандартній поведінці соціуму у подібних обставинах: сильне емоційне збудження, яке мало ознаки колективного психозу, воєнничий ура-патріотизм у поєднанні з панічними настроями, інстинктивне прагнення запасатися товарами першої необхідності. Водночас аналіз передвоєнних настроїв жителів міста вказував на помітну присутність у їхній свідомості відчуття неминучого наближення війни. Тобто, можна сказати, в той момент війна починала ставати частиною реальності, щоправда – ще на рівні суб'єктивного сприйняття. У цьому контексті залишається відкритим питання щодо завершення процесу вступу соціуму у війну, який, на думку авторів, окреслюється часом адаптації суспільства до воєнної доби, до поки вона не стала повсякденною нормою. Це зумовлює необхідність подальшого дослідження теми.*

**Ключові слова:** Перша світова війна, Житомир, повсякденне життя, суб'єктивна реальність, об'єктивна реальність, масова свідомість, історичний час.

**The Problem Statement.** Obviously, in history it is not easy to find an example when the first chords of war are accepted by a general public as a logical, completely expected transition of the enemy state to the use of force methods and means to achieve political goals. In our recent past, we were convinced of this twice: in 2014 and 2022. It is noteworthy that in both cases the entry into the war took place “unofficially”, i.e. without declaring it. The first time it was on March 1, 2014, when the Council of the Russian Federation supported President V. Putin's request for permission to use armed forces on the territory of Ukraine. In the minds of the Ukrainians, the mentioned act was considered nothing but an informal declaration of war. However, its hybrid, locally limited nature quickly erased the existence of war from the worldview of the majority. This, in particular, was evidenced by the lack of deep changes in the electoral views of the population of the eastern regions. For the second



time, the war broke out in the morning on February 24, 2022, and with accompaniment of air sirens, which become an integral part of today's everyday reality.

In this context, the issue of analyzing the phenomenon of "entry into war" on the basis of our historical past is actualized. According to the authors, it has a certain duration in time, the exact definition of a chronological framework of which can become the subject of scientific discourse. The tragic events of 1914 – 1918 completely overturned contemporaries' ideas about war as a special social reality. Absorbing all social strata without exception, it blurred the boundaries between such seemingly opposite categories as: the front and the rear, real and fictional, yesterday and today.

**Review of Recent Publications and Researches.** Despite a growing scientific interest in World War I, it is still considered an underestimated period. Speaking about the history of Zhytomyr from 1914 to 1918, it is worth mentioning first of all the article by I. Kovalchuk, in which there are analyzed some features of the socio-political, economic and social life of the city during the period under analysis (Kovalchuk, 2015). Taking into consideration the subject of our research, i.e. first of all in an everyday context, we should say that in 1914 the society behaviour in Ukrainian cities is mostly highlighted as a temporary burst of cheer-patriotism under the influence of the Russian imperial propaganda (Vilshanska, 2014; Kolyada, 2018; Kutsyk, 2022). At the same time, scholars often ignore the analysis of the pre-war population's moods. An exception is the article by S. Dehtiarov and I. Romaniuk about the cause-and-effect link between a mental health of the urban population of Right-Bank Ukraine and their reception of World War I outbreak (Dehtiarov et al, 2021) and the monograph by T. Gerasymov, in which it is pointed at anxious expectations of the Ukrainian border provinces inhabitants of the military conflict between the Russian and Austrian empires (Gerasymov, 2017).

The basis of the source base is the archival materials of the Central State Historical Archive (Kyiv), the State Archive of Zhytomyr region, as well as publications of the most popular newspapers of Zhytomyr at the beginning of the 20th century – "The Life in Volyn" and "Our Volyn".

**The Purpose of the Research.** The authors suggested the idea of a new historical and temporal interpretation of the society's entry issue into World War I based on the analysis of a daily life of Zhytomyr population.

**The Results of the Research.** On August 4, 1914, the newspaper "Our Volyn" published the article in which the social atmosphere prevailing in the city in the first days after Germany declared war on Russia was depicted in a vivid journalistic form by a correspondent: "A peaceful sleepy life of the province was shaken: quiet streets were filled with hustle and bustle, people who were used to walking slowly, yawning for hours at the shop-windows, now are rushing along the streets at a feverish speed. Many do not know where and why they are running, but everyone is worried. They meet each other, ask for some news and immediately arise, or, more precisely, countless fantastic rumors are improvised. Prophets have appeared – optimists and pessimists, some predict all kinds of horrors, the others say that war is a necessary disinfection of nations. Fewer people – it will be easier to live! This is the formula of those gentlemen! But, strictly speaking, there are few of them. The majority look at the world of God through the smoked glass of pessimism and despair! "What does the coming day have in store for me?" – that's what you read in everyone's eyes. A huge crowd filled the streets! There were mothers, fathers, wives, sisters and brothers waiting for their relatives from the Military Prysutstviye! This crowd knew that it was necessary to go to war: our Serbian brothers are attacked. A small state groans in the clutches of a huge predator! But the selfish feeling is still stronger than the consciousness of justice! And all those mothers

and fathers screamed and wringed their hands when they found out that their sons were being taken away!” (Nasha Volyn, 2014, July 22).

This fragment can be considered as a kind of slice of a social mood of Zhytomyr residents at the time of the official start of the war. It should be noted that the examples of a human behaviour shown by Zhytomyr correspondent were typical of the European space at the time.

Firstly, the declaration of war caused a “collective shock” with a corresponding mass psycho-physiological reaction. According to the concept of a social psychologist H. A. Marin, in such extreme situations, an autonomic nervous system is activated in people, and there is a negative effect on the digestion, cardiovascular and respiratory systems. This leads to a loss of self-control and unfolding of several scenarios, one of which is running (Marina, 2009, p. 113). That is why, in those days, the city resembled a disturbed anthill.

Secondly, the declaration of war created an enormous demand for news, which could not be satisfied taking into consideration its irrational nature. The thing is that at the moment of a strong psychological excitement, the townspeople seemed to suffocate from the lack of fresh information that would reassure them or, on the contrary, confirm their fears. This naturally led to generation of relevant rumors.

Thirdly, the need to overcome a psychological disorientation caused by the war instinctively brought people to the streets. A famous French writer R. Rolland, observing the mood of Parisians at the time, metaphorically characterized them as “a human river, all the drops of which sought to merge with each other” (Rolland, 2017, p. 101). In Western historiography, the first days of the Great War are often called the “spirit of 1914”, interpreting it as a phenomenon of mass pro-war sentiments (Verhey, 2006). At the same time, attempts are made to cover those events from the standpoint of revisionism, according to which a large-scale support for the war is a contemporary propaganda myth (Ringmar, 2018).

Fourthly, the attitudes of Zhytomyr residents were marked by ambivalence: on the one hand, they were characterized by frank fear of war and an oppressive sense of uncertainty associated with it, on the other hand, by pronounced conformism caused by a general socio-political inertia and Russian pre-war propaganda narratives.

The latter indicated that the process of military preparations of the Russian Empire involved the preparation of a public opinion for a possible start of the Great major European war. In the pre-war years, state propaganda through various communication channels formed the image of the enemy in the mass consciousness of Russian subjects and outlined red lines, the violation of which would mean the transition of the political confrontation to the war phase. Thus, for example, in the spring of 1914, the regional right-bank press widely covered the meeting of the “Club of the Russian Nationalists” in Kyiv, at which the Marmarosh-Sygotsky trial was discussed, at which Orthodox Ruthenians from the village of Iza were accused of their withdrawal from the Union of Brest of 1596. The criminal case was interpreted in no other way than “a religious oppression of the Ugro-Ruthenians” in Austria-Hungary with the use of torture, in particular in the form of a forced baptism of Orthodox girls by “inquisitors”. The meeting ended with a public appeal to the authorities to respond harshly and promptly to the religious and national oppression of the “Slavic brothers” outside the Russian Empire (Kiev, 1914, February 28). The anti-Austrian rhetoric of the local press intensified after the assassination of Archduke Franz Ferdinand in Sarajevo on June 29, 1914. The open sympathies of the newspapers for Serbia considered its conflict with Austria-Hungary as a unilateral aggression by the latter with a hint of the need to provide immediate assistance to the “brotherly country” (Gerasymov, 2017, p. 98).

Obviously, the so-called “witch hunt” – the fight against the real and imaginary agent network of the Central Powers – had a noticeable impact on the formation of pre-war moods

in Zhytomyr. And although the vicissitudes of the “war on the secret front” a priori should not have gone beyond certain competent and informational frameworks, the growing atmosphere of espionage mania could not but seep into the public space. For example, in the summer of 1912, the Zhytomyr newspaper “The Life in Volyn” publicly accused the staff of the “The Rabbetke and Gizeke Seed Factory” located in Vinnytsia of espionage for Germany (CSHAUL, f. 442, d. 859, c. 45 (6), p. 70). The reason for the start of the information war was the suspicion by the tsarist special services of the controller of the enterprise, K. Gade, who, allegedly under the guise of inspecting beet plantations in Volyn province, collected intelligence in a number of settlements, in particular in Rivne and Volodymyr-Volynsky, which were of a strategic military importance (CSHAUL, f. 442, d. 859, c. 45 (6), pp. 70, 113). Despite the lack of direct evidence against K. Gade in the security agencies and the fact that the plant administration filed a lawsuit against the newspaper for defamation, this caused a great stir in society. Thus, the “witch hunt” process involved not only the security agencies, but also a certain part of the public, whose mouthpiece was the press. It is also worth focusing on the fact that the Balkan crisis of that year caused systematic directives in the provincial gendarmerie administration to prevent the spread of rumors among the population about a probable start of a war between Russia and Austria-Hungary (Gerasymov, 2017, p. 94). Thus, the anxious mood in Zhytomyr in 1912 can be interpreted as a “collective premonition of war”. The catalyst for this anxiety was the intensification of reconnaissance activities of the Austro-Hungarian aviation, which in June of 1914 studied the location of the Russian troops near Zhytomyr. Since the flights were carried out during the day and at a relatively low altitude, a large part of the population could see them (Zhizn Volyni, 1914, July 13).

Thus, there are reasons to claim that the war entered people’s lives even before its actual beginning as a certain subjective reality. Such a conceptual approach should be connected with a historical and philosophical category “historical time”, a theoretical and methodological understanding of which underwent fundamental changes during the period of the 20th – 21st centuries. A new paradigm denies the existence of the past and the future as separate categories, which are always mutual projections (Tamm, 2019, p. 2). This allows us to talk about a chronological blurring between different historical periods, in particular between peace and war. According to the above interpretation of historical time, for Zhytomyr community, the “entry into the war” de facto began earlier than the moment of its official declaration.

From this position, in August of 1914 the mood of society can be considered as an individual and collective reception of a new reality with a clear dominance of an emotional and sensual component of consciousness over the rational one. An extremely intense nature of the first was caused not so much by the official start of the war, but by the general mobilization announced on July 31.

That is, it can be argued that, in general, the transition of war from a hypothetical (subjective) dimension to a real (objective) one was not characterized by rationality and logical sequence, since awareness of inevitability of an event does not always mean a psychological readiness for its occurrence and acceptance. We were convinced of this on February 24, 2022, when a full-scale Russian invasion looked like an “expected surprise” to the majority of the Ukrainian citizens.

In August of 1914, crowds organized by local political organizations, the regional government, and the church could often be seen on the streets and squares of Zhytomyr. The mood of the townspeople was a symbiosis of a militant cheer-patriotic enthusiasm and panic. This was, for example, clearly visible during the speech of the governor of Volyn to the demonstrators, in which he had to refute the rumors spreading in the city about a possible occupation (Zhizn Volyni, 1914, July 21).

It should be noted that the broad strata were influenced by rumors contrary to the propaganda campaign about the success of the Russian troops in Galicia in the summer-autumn of 1914. At the same time, the degree of trust in such information was inversely proportional to their veracity. It was not by chance that the press noted that “the more obvious any nonsense, the more readily people believed in it” at the time (Yuzhnaya kopejka, 1915, January 6). Thus, for example, at the end of August of 1914, in Zhytomyr there were rumours about Japan’s declaration of war on Russia (Zhizn Volyni, 1914, August 3).

A positive image formation of the war by printed propaganda organs hyperbolized its reception by children. First of all, it was caused by numerous newspaper reports about the exploits of Russian soldiers, among which stories of heroic deeds of “young volunteers” appeared systematically. Thus, for example, on September 17, 1914, in “The Life in Volyn” there was published an article about the exciting adventures of several boys who participated in six battles as part of Moscow regiments and returned safe and sound (Zhizn Volyni, 1914, September 4).

Militarization of mass consciousness naturally led to popularization of “war games” among children. They were noted for their fierceness and hardness, as children usually left the “battlefield” with bruises and scratches. On the outskirts of Zhytomyr, they were held in August of 1914, the winners of which were determined by the result of a “wall-to-wall” battle (Zhizn Volyni, 1914, August 12).

In addition to printed media, cultural and entertainment institutions played a significant role in the structure of state military propaganda. By coincidence, the declaration of war took place simultaneously with the opening of a new theatre season, the owners of which were obliged to adjust the repertoire in accordance with the new military and political circumstances significantly. Therefore, for the first time in many years, instead of G. Verdi’s opera “Aida”, the season was opened by M. Hlinka’s “Life under Tsar’s Rule” in Zhytomyr City Theatre. Theatrical action was accompanied by the performance of the anthems of the Russian Empire and the Allied Powers with the joint participation of theatregoers and their audience (Zhizn Volyni, 1914, August 29). An active propaganda role was played by the cinema, on the screens of which various patriotic pictures were shown. For example, in November of 1914, the film “In Defense of the Slavic Brothers” was shown to the audience at the “Lux” cinema in Zhytomyr. Its purpose was obvious – through the image of a crowded demonstration in Moscow during the entry into the war (Zhizn Volyni, 1914, October 30) to support the feeling of the national unity of the public.

War propaganda also affected fine art, the effect of which at the time of entry into the war was particularly strong and even symptomatic (Fondren & Hamilton, 2022, p. 15). The reaction of Zhytomyr population to the paintings with battle scenes of World War I displayed in the shop-windows of local shops with exclamations: “That’s how it is! Chop! Don’t give up!” (Zhizn Volyni, 1915, January 23) can rightly be considered a sign of a collective psychosis of the time.

However, contrary to propaganda narratives aimed at demonizing the image of the enemy in the mass consciousness, there were no systematic manifestations of aggression or contempt in the attitude of the local population towards foreign prisoners of war. Obviously, this was explained both by the hope of a similar treatment of the enemy side towards their captured compatriots, and by a noticeable presence among the Austro-Hungarian soldiers and officers of representatives of the Slavic peoples. In September of 1914, when captured Austro-Hungarians passed by Zhytomyr, one of them even carried a purple rose in his hand (Zhizn Volyni, 1914, September 3).

In October of 1914 this tendency led to the spread of conversations among the wounded soldiers of the Russian army in Zhytomyr infirmary that sisters of mercy treated them worse than the captured Austro-Hungarians, who also needed medical help (CSHAUL, f. 1262, d. 2, c. 20, p. 81).

The arrival in Zhytomyr for the treatment of the first wounded servicemen of the Russian army activated a public movement to provide them with additional assistance, as unpreparedness of the tsarist regime for large-scale combat losses became obvious immediately (Zhvanko & Nestulya, 2017, p. 110). For the local Jewish and Polish communities, an active participation in this process served as an additional tool for the government to certify its loyalty in order to reduce possible risks, because the authorities considered them to be politically unreliable categories of the population. Zhytomyr Jews allocated 15 beds in their hospital for treatment of the wounded (Zhizn Volyni, 1914, August 21), and the Poles opened a separate infirmary with 20 beds (Zhizn Volyni, 1914, August 29).

In October of 1914, a struggle against the “German world” was waged in Zhytomyr, initiated by the renaming of St. Petersburg to Petrograd on August 31. After that, the city authorities made a decision to change the names of two city streets, named in honour of the imperial capital, from the old, “German” ones to the new ones – “Russian” (Zhizn Volyni, 1914, October 14).

The beginning of the war led to material and household problems, which worsened with each subsequent month. There were objective and subjective reasons, and the latter often dominating. In this sense, there was reaction of Zhytomyr merchants to an instinctive stocking up of essential products by the population in the first days of the war in the form of a sharp increase in prices and creation of an artificial food shortage (Zhizn Volyni, 1914, July 23).

Instead, more objective reasons caused the housing crisis. Since during World War I, the city served as a centre for the deployment of significant military formations and a stronghold for mobilization measures on the front line (Kovalchuk, 2017, p. 23), suburban population actively flocked to Zhytomyr in August, as well as native residents returning from their dachas (Zhizn Volyni, 1914, July 23). Such a significant influx of human masses led to an increase in housing prices (Zhizn Volyni, 1914, August 3). The situation was also taken advantage of by Zhytomyr transport drivers, who, due to a sharp increase in demand for passenger services, ceased to adhere to the set fare (Zhizn Volyni, 1914, July 24).

At the same time, due to the movement of conscripts to mobilization stations and back on mobilization days, the load on tram traffic increased significantly. On the main Zhytomyr street – V. Berdychivska, there were 15–20 people standing at the front of the carriages, where only 6 or 8 seats were allocated (Zhizn Volyni, 1914, July 24). Local passengers were also dissatisfied with the increase in fares from 11 to 13 kopicks by the managers of the tram company without coordination with the city authorities. The increase in fares led to the fact that the need to sequester the tram company became a popular topic of conversation in the city (SAZR, f. 62, d. 1, c. 1249, p. 6).

**The Conclusions and Prospects for Further Research.** On August 1, 1914, the population of Zhytomyr faced a new objective reality – the beginning of World War I. The reaction of Zhytomyr population to this event corresponded to a standard behaviour of the society in similar circumstances: a strong emotional excitement that had signs of a collective psychosis, a militant cheer-patriotism combined with panicked moods, an instinctive desire to stock up on basic necessities. At the same time, the analysis of the pre-war moods of the city’s residents indicated a noticeable presence in their minds of the feeling of war inevitability. That is, we can say that at the moment the war began to become part of reality, although still at the level of a subjective reception. In this context, the issue remains open regarding the completion of the process of society’s entry into war, which, according to the authors, is defined by the time of society’s adaptation to wartime, until it became an everyday norm. This aspect necessitates a further research on the issue.

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**CHILDHOOD ILLNESSES AND EPIDEMICS DURING THE INTER-WAR PERIOD  
IN THE UKRAINIAN SSR: CAUSES, NATURE, ATTEMPTS TO OVERCOME**

**Abstract.** Our research is devoted to the correlation between the government’s declared care of children and the situation regarding child health protection in Soviet Ukraine during the Inter-War Period. We pursue to characterise epidemiologic status, determine the infection rate among children, ascertain reasons for worsening epidemiologic conditions, as well as define the efficacy of government measures directed towards their elimination. First of all, governments of civilised countries have to care about their citizens and children’s health. For this reason, the slogan “A healthy family is a happy country” was formed and popularised in modern times. Therefore, we have attempted to do the research on the efficacy and impactfulness of the communist regime regarding children, who lived on the occupied by Bolsheviks territories in the newly created pseudo-state of the Ukrainian socialist soviet republic, how objective communist slogans about “happy soviet childhood” appeared to be. **Methodology of the Research.** There have been applied general scientific methods of research – analysis, synthesis, the principle of historical approach, and also used interdisciplinary methods: psychology and medicine. **Scientific Novelty.** For the first time, the study found out the reasons for the deterioration of the epidemiological situation in the Ukrainian SSR. It was determined which epidemics spread from among children and the causes of diseases were indicated. We came to the **conclusion** that the epidemiological situation among children during the interwar period was extremely unsatisfactory. The reasons were both objective in nature: the consequences of World War I, the mass artificial famine of 1921 – 1923, and purely subjective: the communist officials were unable to create an effective system of medical care for children, to organize the vaccination process. The Holodomor of 1932 – 1933 became a genocide. The Holodomor took millions of victims. The children, exhausted by starvation, were unable to resist diseases and infections. Organized by the Bolshevik communist regime, the Holodomor became the aggravating factor that prevented millions of children from living full lives. The authorities not only failed to save the children by providing the necessary medical care, vaccinations, and medicines. On the contrary, the communists used the Holodomor as a scourge to destroy disobedient Ukrainians and their children.

**Key words:** children, diseases, epidemics, Holodomor, genocide.

## ДИТЯЧІ ХВОРОБИ І ЕПІДЕМІЇ В УСРР МІЖВОЄННОГО ПЕРІОДУ: ПРИЧИНИ, ХАРАКТЕР, СПРОБИ ПОДОЛАННЯ

***Анотація.** Наше дослідження присвячене аналізу співвідношення декларованої урядом турботи про дітей із реальним станом справи захисту їх здоров'я у радянській Україні міжвоєнного періоду. Авторка поставила за мету охарактеризувати епідеміологічний стан, визначити рівень захворюваності дітей на інфекційні хвороби, з'ясувати причини погіршення епідеміологічної обстановки та з'ясувати ефективність урядових заходів, спрямованих на їх подолання. Адже уряди цивілізованих країн мають насамперед, дбати про здоров'я громадян та їхніх дітей. Недарма у новітній час сформульовано гасло "Здорова родина – щаслива країна". Отже, ми намагаємося дослідити, наскільки ефективними та дієвими стали заходи комуністичного режиму щодо дітей, які проживали на окупованій більшовиками території у новоствореній псевдодержаві Українській соціалістичній радянській республіці, наскільки обґрунтованими виявилися комуністичні гасла про "щасливе радянське дитинство". **Методологія дослідження.** Застосовано загальнонаукові методи дослідження – аналізу, синтезу, принцип історичного підходу, а також використано міждисциплінарні методи: психології та медицини. **Наукова новизна.** У дослідженні вперше з'ясовано причини погіршення епідеміологічної ситуації в УСРР. Визначено, які епідемії поширилися з-поміж дітей та вказано причини захворювань. Ми прийшли до **висновку**, що епідеміологічна ситуація серед дитячого населення у міжвоєнний період виявилася вкрай незадовільною. Причини були як об'єктивного характеру: наслідки Першої світової війни, масового штучного голоду 1921 – 1923 рр., так і суто суб'єктивного: комуністичні функціонери виявилися неспроможними створити ефективну систему медичного забезпечення дітей, організувати процес вакцинації. Голодомор 1932 – 1933 рр. став геноцидом. Діти, виснажені голодом, виявилися нездатними протистояти хворобам та інфекціям. Організований більшовицьким комуністичним режимом Голодомор став тим обтяжливим фактором, який завадив мільйонам дітей жити повноцінним життям. Влада не лише не вдалася до порятунку дітей, шляхом надання необхідної медичної допомоги, щеплень, медикаментів, а й, навпаки, використала Голодомор як молюх для знищення непокірних режиму українців та їхніх дітей.*

***Ключові слова:** діти, хвороби, епідемії, Голодомор, геноцид.*

**The Problem Statement.** The value of a country is its children. Their health care must be prioritised in the policy of any state. Democratic societies make attempts to follow this strategy and care about further generations. Totalitarian regimes, unlike, usually tend to declare only their juvenile policy. They seldom determine childcare as the principal vector of their political programmes due to its evaluation as a component of a whole system. Historical precedents prove our hypothesis that totalitarian states do not consider juvenile values to be essential. In particular, the policy of communist and totalitarian regime regarding children of Soviet Ukraine demonstrated an absolute disregard of their needs and neglect of any values what did have nothing with strengthening the personality cult of the leader.

**The Review of Recent Researches and Publications.** Actualised by us problem has an interdisciplinary character. We do research not only on the history of childhood diseases in the medical context. We also focus on the physical and mental health of children of Soviet Ukraine during the Inter-War period. The issue is underexplored. Its distinctive aspects have been disclosed in the research devoted to the Soviet everyday life history (Kulchytsky, 2012). Outbreak of epidemics and government measures towards epidemic prevention in the Ukrainian SSR cities was analysed by M. Melnychuk (Melnychuk, 2017, pp. 107–110), I. Tkachenko (Tkachenko, 2007, pp. 345–375), R. Serbin (Serbin, 1992). In our previous studies, we also raised questions about exacerbation of epidemics in the Ukrainian SSR during the Holodomor (Shugalyova & Moldavskiy, 2019). The obstacles of the research lie in the fact that archival documents demonstrate only old-fashioned childhood disease terms



which are not used nowadays. To reconstruct the dynamics of incidence of illness among children of Soviet Ukraine, we relied on documents from state archives of Zaporizhzhia (State Archive of Zaporizhzhia Region (SAZR), Kharkiv (State Archive of Kharkiv Region (SAKhR), Odesa (State archive of Odesa region (SAOR) as well as Central State Archives of Supreme Bodies of Power and Government of Ukraine (CSASBPG of Ukraine).

**The Purpose of the Research.** Our research is devoted to the correlation between the government's declared care of children and the situation regarding child health protection in Soviet Ukraine during the Inter-War Period. We pursue to characterise epidemiologic status, determine the infection rate among children, ascertain reasons for worsening epidemiologic conditions, as well as define the efficacy of government measures directed towards their elimination. First of all, governments of civilised countries have to care about their citizens and children's health. For this reason, the slogan "A healthy family is a happy country" was formed and popularised in modern times. Therefore, we have attempted to do the research on the efficacy and impact of the communist regime regarding children, who lived on the occupied by Bolsheviks territories in the newly created pseudo-state of the Ukrainian socialist soviet republic, how objective communist slogans about "happy soviet childhood" appeared to be.

**The Results of the Research.** The artificial mass famine of 1921 – 1923, post-war economic recession and poverty were reasons for the aggravation of the epidemiological situation in Ukraine (Vasylchuk & Shugalyova, 2023, pp. 204–220). In those cases, governments of European states were attempting to launch aid campaigns to people by medical care supplement, vaccination, improve adequate nutriment, establish economic and social assistance. However, the Communist regime even did not try to create at least minimum decent human living conditions for the Ukrainians (Shugalyova & Moldavskiy, 2019, pp. 237–257). For example, 77 % of paediatrics used to work in Moscow and Petrograd (Leningrad). In Ukrainian cities, state centres for child care and health started to appear only at the beginning of the 1920s – Motherhood and childhood protection (Okhmadit), People's Commissariat of Health, and social education institutions. Commonly, staff of the newly created organisations did not have enough experience and funds for establishing satisfactory work directed to life protection of little Ukrainians. The government policy did not adequately prioritise the issue concerning the struggle against childhood diseases and infections. The tension kept worsened in cities and villages of the Ukrainian SSR, where devastation, poverty and inability to receive primary medical treatment had resulted in outbreaks of epidemics and plagues.

The most widespread of the diseases were typhus, cholera, and smallpox. Our previous research proves that these diseases acquired a significant outbreak during the mass artificial famine of 1921 – 1923, which accompanied by exacerbation and burdened by the unavailability of appropriate nutrition and medical care service.

The 1926 Census displayed that 58 200 000 children in the USSR aged 0 to 15 (unfortunately, there are no separate data of the Ukrainian SSR). It means that the quantity of child population was 39,5 % (generally, in the USSR). The number of the Ukrainian SSR children was around 40 % which equalled 11,5 million (in 1926).

Forced collectivisation caused the Holodomor 1932 – 1933 substantially transformed the age and social structure of Ukrainian society. All forecasts occurred to be unready to

demographic plummeting caused by the Holodomor. None of the regions in Soviet Ukraine avoided the Holodomor. Children were a vulnerable age group who became massively affected by epidemics in the long-term exhaustion. Diseases triggered by continuous hunger cachexia (protein-free oedema, catarrhal gastritis, gastritis, enterocolitis).

Notably, in the civilised world, a government, first of all, should provide the existence of disadvantaged children. However, the Communist and totalitarian regime did not only abandon little citizens to the mercy of fate but did not guarantee appropriate medical treatment.

At the beginning of the 1930s, an aggravation of the epidemiological situation was registered in the Ukrainian SSR. In Kharkiv, where statistics was collected more or less complete (considering that Kharkiv used to be the capital of the Ukrainian SSR), the prevalence of typhoid, typhus, bloody flux, scarlet fever, measles and smallpox was registered.

*Level of infectious diseases in Kharkiv (absolute numbers)*  
(SAKhR, f. R-1962, d. 1, c. 281, p. 321)

Disease	Prevalence dynamics in years		
	1930	1931	1932
Typhoid fever	1636	3122	2813
Bloody flux	57	112	84
Typhus	52	397	606
Scarlet fever	5151	3323	2093
Diphtheritis	1654	2332	1577
Measles	6609	1343	5958
Smallpox		7	30

Since 1932, the People's Commissariat of Health had been developing plans to create network of isolation checkpoints (CSASBPG of Ukraine, f. R-342, d. 2, c. 4634. 50 p.). Epidemics of typhus was particularly dangerous. However, the communist and totalitarian regimes acted according to their traditional scenario. The point is that all earned by Ukrainian industries incomes were directed to Moscow centre. There, all funds were redistributed, first of all, to the so-called "the century buildings". In this regard, all organisational and financial problems connected with the medical provision and struggle against epidemics passed on local governments, which did have no material possibilities to overcome them.

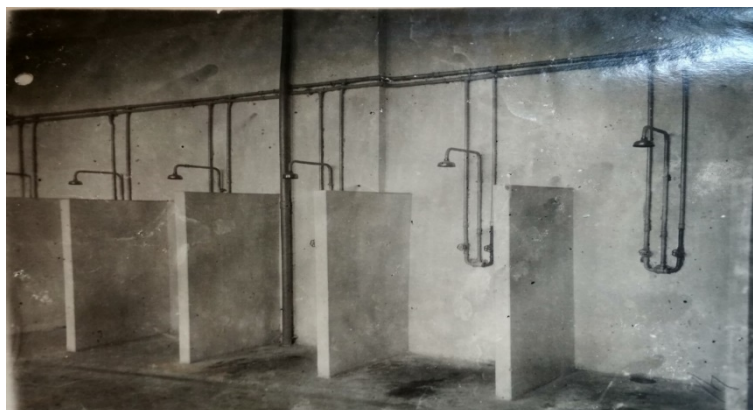
To save costs, children's hospitals, orphanages, quarantine centres, etc. did not build but used ordinary buildings which were poorly equipped with personal supplies (CSASBPG of Ukraine, f. R-342, d. 2, c. 4634, p. 1). Even following official documents, which displayed everyday reality quite distantly and perversely, maintenance of quarantine centres with equipment was bad and disproportional enough – 30 beds, kitchen utensils, four buckets, undergarments including spare change set, and hair cutting machine. However, funds were provided for "adequate medical service". Sickbay and checkpoints quite often used to be equipped for donations of big enterprises, as well as on their territories. Generally, such sickbays were used by employees and their family members who worked at enterprises. The Soviet demagoguery even advertised newly opened sickbays taking pictures of them (overall, photographs of Soviet everyday life in 1920–30 are often propaganda posed and did not show realities). For example, defiantly declarative photographs of typhoid-like sickbays are reserved in the National archives of Ukraine.

*Sanitary checkpoint*



CSASBPG of Ukraine, f. R-342, d. 2, c. 4634, p. 44.

*Shower room in a quarantine centre*



CSASBPG of Ukraine, f. R-342, d. 2, c. 4634, p. 46.

According to memories of eyewitnesses, hardly ever did anyone returned alive from typhoid barracks. Local citizens would keep away from the typhus hospitals area and whisper about the patients like about deceased ones.

The adult population, especially workers, had a chance to receive medical treatment. Although a stay in typhoid sickbays hardly can be called treatment, the places were reservations for potential corpses. Notwithstanding, adults were at least isolated what created minimal protection for non-infected, whereas children in orphanages received neither medical treatment nor food aid. During the Holodomor of 1932 – 1933, social education institutions for children (baby houses, orphanages, fosterage, etc.) transformed into “concentration camps for children” (Dzhun, 2014) and “conveyor line of infant mortality” (Shugalyova, 2017). Both sick and healthy children were kept in the same premises without applying appropriate sanitary measures, medical treatment, often poorly clothed and uncared-for.

Continuous fasting and inanition of the body caused worsening the epidemiological situation: protein-free oedema (modern definition is alimentary dystrophy; synonyms: hunger disease, hunger oedema, alimentary dystrophy) is a disease of durable inadequate nutriment which reveals in cachexia, progressing total metabolic disorder, as well as tissue and organs degeneration with dysfunctions. The main etiological agent is the longstanding (weeks, months) inefficient caloric value of nutrition. The sickness intensifies due to infectious diseases. Alimentary dystrophy (Bezbaikovy nabryak, 2021), malnutrition, intoxications (*Intoxication can be caused by toxic outputs formed in various diseases (allergies, burn disease) and extreme conditions. In infectious diseases, accumulation of bacterial toxins and other products of microbial activity, as well as tissue breakdown product, are not a rare event. In chronic uraemia, inflammation is common in the places of nitrogenous slag secretion: in the larynx, gastrointestinal tract, and accumulations of urea crystals (uremic powder) appear on the skin. In intoxications, a sick person has symptoms of malaise, irritancy, feeling unrested, headache, dizziness, nausea; when exhaustion occurs, body's resistance decreases.* In some cases, endogenic toxicosis can take the form of severe acute poisoning (vomiting, stupefaction, comatose state). It is typical for acute kidney failure, hepatic encephalopathy, toxæmic shock, acute burn toxæmia (Intoksykatsiya, 2021), colitis (intestinal mucositis). Colitis is a dangerous disease that follows water and electrolytes absorption disorder (sodium, potassium, magnesium, phosphorus, calcium, zinc), which leads to diarrhoea and dehydration. Ulcerative colitis can be worsened with bleeding, dilated colon and its stretching (dilation), formation of a hole in the intestine (perforation) and bowel cancer) (Kolit, 2021), catarrhus (catarrhal gastritis can be caused due by an infection that follows vomiting and flux), dysentery (is a syndrome of an acute human injury with inflammation of the distal part of the colon with typical development of colitis and hemafecia) (Dyzerentriya, 2021), bloody diarrhoea (it is a major reason for nutriment problems among infants aged up to 5. Children who have to malnourish or have their immune system weakened are vulnerable to diarrhoea. In measles disease, children have flux that exhaust organism, even more, creating favourable conditions for complicating disorders) (Khliborob Ukraini, 1963), diarrhoea (or “runner” (“bihunka” in Ukrainian) is a frequent liquid or watery bowel movement which distinguishes it from ordinary faecal ones that a child has. Diarrhoea can be followed by anorexia, vomiting, significant weight loss, stomach ache, fever), typhus (another name is famine fever is an acute contagious disease which transmits together with lice from a sick person to a healthy one characterised with fever, specific skin rash, as well as nervous and cardiovascular systems damage) (Vysypnyy tyf, 2021), tuberculosis (is a widespread and mainly terminal infection with chronicity and frequent multisystemic damage), pneumonia (an acute infectious lung inflammation; it develops due to the weakened immune system) (Pnevmoniya u ditey, 2021), measles (highly contagious viral infection, most widespread among children. It defines fever, cough, acute rhinitis, conjunctivitis, enanthema (Koplik's spots) in the oral mucosa and maculopapular rash which spreads cephalocaudally. Measles complications are pneumonia, encephalitis, hepatitis) (Kir, 2021), pertussis (is a very contagious disease that happens to children and teenagers and conditioned by bacterial nature with a subsequent strong whooping cough) (Koklyush, 2021), parotitis (mumps is an acute infectious disease which follows fever, general intoxication and adenopathy). Sometimes, atypical diseases, which names are hardly remembered nowadays, such as varicella (varetselia), mulligrubs (rizachka), infantile, non-vitality, were noted in death certificates (Starukh & Turchenko, 2008).

In 1932, the epidemic threshold soared. Epidemics spread all over Ukraine. At one of the doctors' meetings, Mrs Iershova, a doctor of Kharkiv orphanage, pointed out that children had been suffering from colitis and dysentery. Moreover, the epidemic of tuberculosis was close to second. In Serdiukovskyi orphanage Nr 9, the doctor admitted numerous complications after colitis, dysentery and intoxication. Remarkably, 26 out of 36 orphans living there were sick of a bloody flux (Hnyezdilo, Lapchynska, etc., 2009, pp. 160–162).

Noticeably, institutions of the People's Commissariat of Health did not hurry to release the statistics regarding both sick children and those who died due to a disease. Anti-epidemiologic measures that were applied regularly on the territory of the Ukrainian SSR were concealed behind the struggle for tidiness. Children and orphanage personnel had their hair cut short, as well as their clothes chlorinated and formalinised. As officially explained, it was an attempt to avoid panic among the population, whereas, in reality, it was an approach to dissemble high levels of cases of emaciated children and their mortality.

Infant mortality had been soaring dramatically. Authorities of the Motherhood and Childhood Protection (Okhmadit) would report The City Health Department about non-surviving children every decade, and the statistics were disappointing. Remarkably, orphanages appeared to be the ultimate conveyors of infant mortality. For instance, between December of 1932 and November of 1933, 788 children died in the Zaporizhzhia Baby Nursery. Since spring of 1933, the number of dead in the Baby Nursery had constantly been increasing. In March of 1933, the deaths of 74 children were registered. The end of the spring the beginning of the summer in 1933 was a peak time for wholesale deaths. In May of 1933, an average number of tolls a day rose to 8 (SAZR, f. R-5593, d. 13, c. 323, pp. 1–12). During that month, 124 children died in the nursery. In the registration slip, there were registered such disease cases as “fatigue” (30), “catarrhal gastritis” (29), “pneumonia” (10), “gastric diseases” (5), “heart diseases” (2), “measles” (8), “chronic “congenital debility” (3), “intoxication” (1), etc. Since August of 1933, a decrease of mortality was being observed. In the Bureau of Civil Registrations register books, mostly “atrophy”, “intoxication”, “congenital debility”, “colon catarrh”, “catarrhal gastritis”, pneumonia and measles were indicated as a cause of death. Remarkably, in the documents regarding the Zaporizhzhia Baby Nursery were no records of “famine” as a cause of death. Doctors and orphanage personnel received particular directions not to record an immediate cause of death. Behind the meaning of a cause of children's death by contagious disease, doctors did hide famine as an ultimate cause. However, atrophy or congenital debility or numerous catarrhal gastritis cases are consequences of continuous hunger and physical exhaustion. A memorandum report, written by the head of the sanitation centre in Dnipropetrovsk region Krol, approves this presumption. He informed that the number of sick for disease marked as “other” had increased. A majority of people were diagnosed with “protein-free oedema” and “fatigue”. Considering that patients were workers of big enterprises (Petrovskiy plant, Dnipropetrovsk Molotov Mineral Fertilizer Plant, Coke plant), the authorities organised additional dietary canteen and provide them and their children with food aid. Therefore, a background for causes of death recorded in the Bureau of Civil Registrations was continuous hunger cachexia. Meanwhile, although strategic enterprise workers would sometimes receive medical treatment and food aid, the rest of the population (peasants, children, orphans) were left to waste.

Scales of mortality in institutions were by far higher as statistics were inaccurate or there were no calculations. Personnel of the Krupskaya juvenile prison documented that they had not kept any records of children taken before May of 1933. However, from 25 May to 25 June in 1933, the establishment took 585 homeless children, 150 of who died in the particular period. There were 66 unknown babies aged up to 3 amongst them (SAKhR, f. R-2762, d. 2, c. 82, p. 27).

During a closed meeting of doctors, Mrs Gurevich, the head of the Kharkiv Communist Children Isolation Centre, informed that in large numbers children, aged 1 to 1 year and two months, came to her centre exhausted and diagnosed with bloody flux. Infant mortality in isolation centres had been soaring because nutrition included corn only. The director and doctor of the Illich orphanage (Kharkiv), Mrs Yershova, also confirmed a mass influx of children who mostly were ill. According to doctor Yershova, the mortality rate in the orphanage was high. In the Serdiuk orphanage (Kharkiv oblast), the mortality rate was 60 %, many children suffered from colitis. 26 out of 36 taken to Kharkiv orphanage Nr 9 babies

appeared to be sick with bloody flux and were in bad condition, according to the doctor (Hnyezdilo, Lapchynska, etc., 2009, pp. 160–162).

According to the report of the Odesa People's Commissariat of Health, although 506 862 persons were vaccinated, only in Spring of 1933, the regional outbreak of typhus epidemics triggered in the orphanages of Pervomaisk (28 cases), Mykolaiv (21), the Voznesensk orphanage (16), the Zinoviivka orphanage (4), the Novourkainka orphanage (11), in Harbuzivka (3), Frunze and Kakhovka orphanages (in both 5), as well as in Holovanivka, Karl-Liebkechtivka, Khmilne and other districts (1 each) (SAOR, f. 710, d. 1, c. 667, p. 36). However, it was said to have not been enough to fight the problem (SAOR, f. 710, d. 1, c. 667, p. 67). Particularly, nurseries did not reach minimum sanitary standards. Children did not have their hair cut, did not take bath, everybody had lice, healthy children had to live along with sick ones, and nutrition was poor (especially it was in bursary of the MTM of Khakhovka (The Machine and Tractor Manufactory of Khakhovka), communal farm (kolkhoz) "Red Labourer" (Chervonyi batrak) and "Kim" of Zhovtnevy district) (SAOR, f. 710, d. 1, c. 667, p. 67). Yet, in summer 1933, epidemics (especially typhus) became more threatening. It forced the government to intensify the vaccination process, imply disinfection of bath-houses, and build a disinfection centre at the Ivanivka orphanage in Odesa region (SAOR, f. 710, d. 1, c. 667, p. 88).

In summer of 1933, there was another outbreak of death. It was due to the fact of the outbreak of another epidemic against the background of physical exhaustion.

From the epidemic point of view, homeless people were particularly unreliable. This social category used to become as much an infection spreader. For instance, by the statistics in Kharkiv, in November of 1932, there had been 8 cases of typhus disease in the first part of March of 1933 there were 226 cases registered. Over 60 % of patients were homeless (SAKhR, f. R-1962, d. 1, c. 281, pp. 242–244).

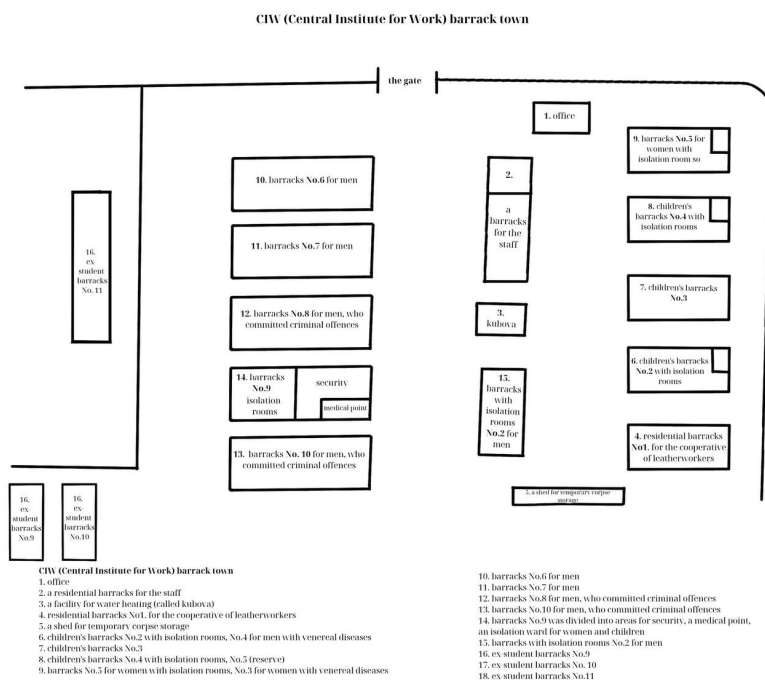
On 4 July of 1933, a discussion about the struggle against homelessness took place at the Kharkiv city council session. During the meeting, a spokesperson highlighted that 18 thousand children were in asylums but they "are perishing and perishing desperately" (Hnyezdilo, Lapchynska, etc., 2009).

In August of 1933, the authorities observed health camps in Odesa and registered 3 cases of paratyphoid, 18 cases of measles, 2 cases of scarlet fever, 2 cases of influenza, 2 cases of dysentery, 4 cases of dermatophytosis, 5 cases of varatselia, 11 cases of colitis, 18 cases of pertussis, 21 cases of parotitis ("mumps") (SAOR, f. 710, d. 1, c. 667, p. 116). In general, a decrease in epidemic level, especially regarding typhus in comparison with 1932, was declared (SAOR, f. 710, d. 1, c. 667, p. 168).

Unfortunately, disinfection measures could not cover all the population. Sometimes, anti-epidemic actions caused trouble. In particular, in Odesa oblast in August of 1933, there were only 7 631 out of 50 thousand children medically observed (SAOR, f. 710, d. 1, c. 667, p. 168 back). Ill homeless small children of all ages were sent to so-called typhoid barracks where the possibility to return alive were very low. Such typhoid barracks were located almost at the outskirts of every big city, outside of Odesa, was a Starostin club on 22 and 25 Chornomorska street, 55 Chervona Hvardiia street (Red Guard street), and 35 Komsomolska street. Outside Kharkiv, there was the CIW (Central Institute for Work) or CIW barrack town (on Hryhoriivske highway) and Saltivka, Shatylivka, Vaschenko barracks (Hnyezdilo, Lapchynska, etc., 2009, pp. 31–32). The situation in the CIW barracks was so harsh and always attracted attention. In spring of 1933, 347 children living there were clothes, suffering from lice, dirty and extremely exhausted. They used to sleep on the bare floor without straw (Hnyezdilo, Lapchynska, etc., 2009, p. 121). They would eat soup ad 400 grams of bread a day. One of the doctors working there reported about the sanitary conditions of the CIW barracks (Hnyezdilo, Lapchynska, etc., 2009, pp. 31–32). There were

no beds. In winter, people in barracks used to be poorly clothed. Those who were lucky to attain a mattress filled with straw immediately ripped it to get inside so they would spend whole days without living it for obeying the call of nature. “Lavatory” was located precisely in the barracks (Hnyezdilo, Lapchynska, etc., 2009, pp. 31–32). All attempts of the Special Juvenile Legal Protection members to transfer children and older people to separate rooms were failed due to the lack of premises. The arrangement of the CIW (Central Institute for Work) barrack town was somewhat different. There was an office, a residential barracks for the staff, a facility for water heating (called “kubova”), a residential barracks for the cooperative of leatherworkers, a shed for temporary corpse storage, two children’s barracks with isolation rooms, one without isolation, three student barracks, two separate barracks for men and women with venereal diseases, one for women, one for men, two barracks for men who committed criminal offences. Barrack No. 9 was divided into areas for security, a medical point, an isolation ward for women and children, and an isolation Barrack No. 2 for men (SAKhR, f. R-408, d. 8, c. 1806, p. 140).

*The CIW barracks’ location scheme*

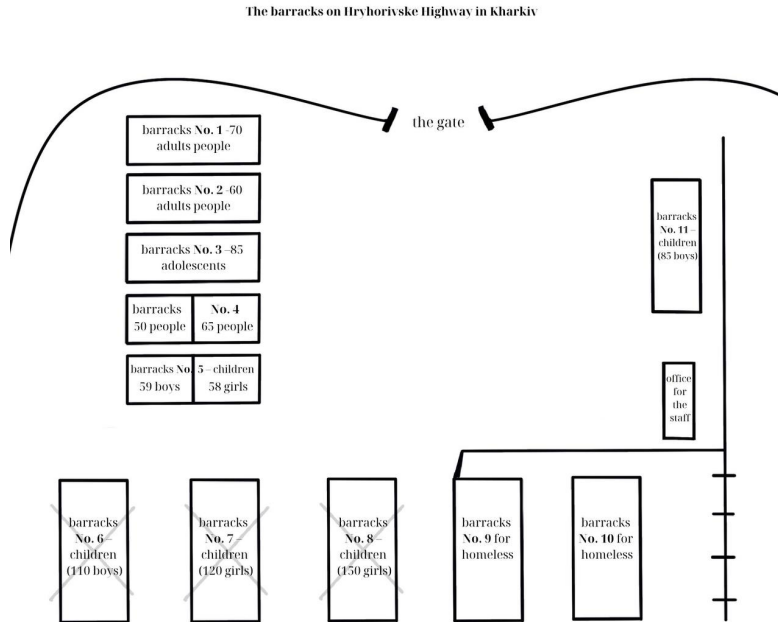


SAKhR, f. R-408, d. 8, c. 1806, p. 140.

The barracks on Hryhorivske Highway in Kharkiv were a complex of several buildings intended for homeless adults, adolescents, and children. 60 and 70 adults lived in barracks No. 1 and 2, respectively; in barracks No. 3, there were 85 adolescents; in No. 4 were 110 people. Barracks 5, 6, and 7 were occupied by children, with 169 boys and 328 girls. Homeless men and women of various ages inhabited the remaining barracks. In August of 1933, the barrack complex housed 757 homeless individuals and 70 staff members, totalling

827 people (SAKhR, f. R-408, d. 8, c. 1806, p. 138). Due to an exceptionally high mortality rate, the population dynamics in the barracks changed rapidly.

### *Barracks' location scheme*



In August 1933, the barrack complex housed 757 homeless individuals and 70 staff members, totaling 827 people.

SAKhR, f. R-408, d. 8, c. 1806, p. 138.

Malnourishment and anti-sanitary conditions caused an epidemiologic outbreak. Unfortunately, institutions of State Child Custody did not follow at least minimum sanitary norms. Even canteen personnel of “model” nurseries did not wear a uniform (i.e. nursery cook used to wear the same hat as outside as in the kitchen). In this regard, no words are needless to say about foster children. They had not visited bath for months: there were no possibilities to heat water due to the lack of coal, as well as it was hard to get to public city baths as children did not have clothes, towels and soap. In warm seasons, sometimes orphans visited riverside but very rarely. Tetiana Kyiko, a former foster child of the Myrhorod orphanage, recollected: “...A great event for children was swimming in the Khorol river. Being divided into groups of 10 people, we were brought to the water where we reduced parasites and layers of dirt from our bodies” (Babenko & Skryl, 2017).

The majority of children suffered from lice, skin diseases, eczema. The problem worsened due to the lack of sanitary conveniences and canalisation in buildings. In winter, children could not go outside to visit toilets (as they did not have any clothes and shoes). Therefore, they did their natural needs directly in the premises of orphanages which affected



anti-sanitary. Reviewers, especially the triad “Friends of children”, The Okhmadit controller always registered violations but did not take any efficient measures. Firstly, civic organisations did not have any administrative influence on the authorities and personnel of childcare establishments. Secondly, orphanages faced a catastrophic lack of human resources. Despite the draconian law regarding the systems of employment and punishment for unemployment, people did not agree to work in orphanages or quit because they also could not manage harsh emotional and poor financial working conditions.

The emotional reactions of the Holodomor eyewitnesses, who at that time were children, are quite moving. Tetiana Kyiko was educated in the Myrhorod orphanage. She went there at the age of 8 and recalled that her younger sister Palazhka got ill. “...Day and night, I had been giving her water and herbal infusion, which we were given instead of remedies. I chewed dried bread for her as she was not able to do it herself. Crying and weeping, my brother and I latched onto the cold body of our sibling. Three of us were dragged outside. A grave covered with reeds on the bottom was prepared near the threshold. Our poor Palazhka was thrown into it. There were days when 15 children died due to the epidemic. They promised brother Hrisha to send him to hospital, but NKVD provided their treatment methods: still alive, children were buried on the ground at night. People who used to live nearby the orphanage saw how behind the barbed wire the ground was moving” (Babenko & Skryl, 2017).

In 1933, in Kharkiv hospitals there were 1716 children aged from 2 and older. Almost 80 % of the patients were residents of Kharkiv city. Assumingly, children from villages did not receive any treatment in the republican centre. Subsequently, any statistical data were not registered. At Okhmadit, a separate hospital for babies and children aged from 2 was established.

Hospital statistics kept one more remark. In 1933, the increase of infectious diseases, tuberculosis and GIT disorders had been diagnosed in children’s hospitals of Kharkiv. Presenting the statistics, doctors accepted the situation as a routine. In the summer period, as they said, the level of infectious disease cases was traditionally high. It was admitted that such dynamics was observed in previous years, particularly in 1932 (!). However, hospitals presented their conclusion: “То есть смертность и в этом году дала снижение по сравнению с 1932 годом” (translation: That means mortality even in this year was in decrease compared to 1932) (quotation in an original language is intentional. Later, there were attempts to edit the documents by erasing (at least rubbing it physically) the word “снижение” (decrease) (SAKhR, f. R-1962, d. 1, c. 289, p. 12). Even on the example of one medical institution, it is possible to analyse the consequences of a period of long-term children’s starvation and their health. Out of 751 children who caught acute infection diseases 79 died (11,8%), 147 infants suffered from tuberculosis, 307 children suffered from colitis (20 % or 84 out of whom died) (SAKhR, f. R-1962, d. 1, c. 289, p. 13). Here is an extract from the protocol: “the group of gastrointestinal tract diseases takes the first place this year amongst other somatic illnesses” (SAKhR, f. R-1962, d. 1, c. 289, p. 14). The percentage of measles cases was substantial. Moreover, measles followed colitis what together triggered complications and caused an increase in children’ death. The most numerous death tolls were among children no older than 8.

In Kharkiv Komunistka isolation centre, during 1–30 November of 1933, 69 children died, in 1-6 December 9 children died, in 16-21 December 14 children died 1933, in 21–26 December 1933 8 children died (SAKhR, f. R-2, d. 1, c. 973, pp. 111–119). It should be noticed that the Komunistka forced labour camp was authorised by Okhmadit so that the head had to provide information about the children’s movements. Even though these medical

certificates were irregular, they started to issue them in autumn 1933. In Kharkiv orphanages, the situation became normalising only by the end of 1933. In that way, in December of 1933, only one child died in the orphanage № 3, both № 4 and № 6 had no tolls, two deaths in the orphanage № 11 (SAKhR, f. R-2, d. 1, c. 973, pp. 121, 123, 125, 139). We realise that the authorities could disclose data partially or inaccurately. However, the general tendency regarding children institutions across the Ukrainian SSR demonstrates that the mortality rate decreased at the end of 1933.

Several million children died during the Holodomor. However, we emphasise that these are only these tolls that can be identified nowadays due to the available statistical documentations.

**The Conclusions.** The epidemiologic situation among the infant population during the Inter-War period appeared to be very dissatisfying. There were either objective reasons – consequences of World War I, mass artificial famine in 1923 – 23, or subjective reasons – communist functions appeared to be unable to establish an effective system of medical treatment for children, organise vaccination process. The Holodomor 1932 – 1933 turned out to be a genocide. The Holodomor took millions of victims. Infectious and chronic diseases intensified the clinical consequences of substantial food shortages. Exhausted by hunger, children were unable to struggle against diseases and infections. Having been organised by Bolshevik communist regime, the Holodomor became an aggravating factor which interfered millions of children to live their ordinary life. It resulted in mass famine, physical exhaustion, contemplation of their relatives' deaths lots of children used to be in a state of mental health breakdown.

The authorities neither recourse to rescue children by providing necessary medical aid, vaccination or remedies. Unlike, the communists used the Holodomor as rubbish to destroy disobedient Ukrainians and their children.

**Perspectives of the research.** No less apprehensible the prolonged consequences of the Holodomor are. At a current stage, interdisciplinary studies which prove guilt and significant affection of the communist totalitarian regime crime against inter-generation outcomes are popular (Ahmadzadeh & Malekian, 2004, pp. 33–36). At the International scientific practical conference “The problem of Existential choice during the Holodomor-Genocide” in 2019, Afif Abdel Nour, an associate professor of the Holy Spirit University of Kaslik and geneticist, presented his study in this field. In the research, he, on the example of victims of the great Lebanon famine in 1914 – 1918 and several further generations and their descendants, proved that continuous hunger evokes people's DNA changes. In Ukraine, familiar inter-generation studies are scientific interests for such specialists as a historian S. Markova, a psychologist L. Zasiékina (Zasiékina & Zasiékin, 2020, pp. 41–58), a culture expert I. Reva, a psychiatrist S. Hluzman, behavioural therapists V. Klymchuk and V. Horbunova (Klymchuk & Horbunova, 2020, pp. 33–68). Based on practical study, the scholars attempt to show the long-term consequences of the Holodomor to the Ukrainian society. Accordingly, I Reva proves that the Ukrainians who are currently living on the territories occupied by the Holodomor in 1932 – 1933 have a lower level of survivability and more tend to commit suicide. At the beginning of 2000, the studies of scientists from Taras Shevchenko National University of Kyiv recorded that descendants of the Holodomor 1932 – 1933 victims have the phenomenon such as an identification with an aggressor – the so-called Stockholm Syndrome. According to the research organisers, 63 % of all respondents who survived the Holodomor 1932 – 1933 tend to distance themselves from the national interests of Ukraine. It can be explained by the fact

that 60 % of the experiment participants lost their relatives and grew up in orphanages in the manner of pro-communist ideology (Reva, 2019, pp. 166–229).

At the same time, as S. Markova's studies prove, the next generations are gradually overcoming post-Holodomor syndrome. S. Markova undertook ethnographic research among the Khmelnytskyi region workers in education to reconstruct distinct aspects of the Soviet educational system. Considering Pioneer and Komsomol activities in their childhood, 69 respondents answered that the worst memories they had were about the collective condemnation of other children; learning the regulations of organisations; memorizing of Politbureau members' names; standing guard over the flag; Pioneer meeting at regional centres on the square in heat weather; school assembly where students were criticised. The majority of respondents showed awareness of a necessity to continue further systematic changes in education through the termination of a broadcast of the Soviet behavioural stereotypes (Markova, 2015).

A doctor of psychological sciences, professor L. Zasiékina and her postgraduate student, T. Horodotska, are undertaking a theoretical and empirical study of the Holodomor nature trans-generation as a moral trauma in family narratives of mothers and daughters. Under the auspices of L. Zasiékina, women who represented several families and different generations participated in the research. Older generation participants are eyewitnesses of the Holodomor, their daughters and granddaughters (family selection was essential as an eyewitness had to have a daughter and a granddaughter. Therefore, gender criteria were a key factor). Selection of the first generation is mothers (10 people) aged from 65 to 77 and the second generation is daughters (10 people) aged from 37 to 49, altogether is 20 people from Vinnytsia, Donetsk, Kyiv, Kherson and Luhansk region, who were interviewed together in focus-groups. According to the result of the research, interviews of daughters are rather distinctive with a greater number of words about the Holodomor events, affects categories and negative emotions compared to mothers what shows better readiness of daughters to express their emotions about those events. Among the indicators of a moral trauma, the appearance of such emotions as rage, sorrow, anxiety is observed in interviewees behaviour what implies the necessity to study the Holodomor, not like the psychological but moral affection of the Ukrainians (Zasiékina & Horodovska, 2021, pp. 49–52).

Therefore, it is arguable that the researches of psychophysical inter-generation consequences of the Holodomor have its scientific perspectives that will help us realise a large scale of tragedy for the Ukrainian nation.

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**THE UKRAINIAN-LANGUAGE EDUCATIONAL LITERATURE  
IN EDUCATIONAL SPHERE OF VOLHYNIA VOIVODESHIP (1921 – 1939)**

**Abstract.** *The spread of Ukrainian educational content in the educational space of Volhynia Voivodeship has been analysed and its influence on the formation of national self-awareness, moral and ethical values among a young generation has been elucidated. The purpose of the research is to analyse the variety and content of the Ukrainian-language educational literature at state and private schools, as well as extracurricular education during the interwar period in Volhynia. The methodology of the research consists of the principles of objectivity, historicism, systematicity, and scientificity. The method of analysis and synthesis has been applied. The scientific novelty consists in the fact that for the first time the practice of using the Ukrainian-language educational literature in the educational sphere of Volhynia Voivodeship has been researched; the ways of the Ukrainian-language books distribution among readers have been clarified; there has been analysed the content of the Ukrainian-language educational literature; an attempt has been made to determine a collective portrait of the*

authors of Ukrainian-language educational literature. **The Conclusions.** Native language didactic literature played an important role in preserving the national identity of the Ukrainians, which was a source of knowledge and patriotic education in the educational sphere of Volhynia Voivodeship. At state primary school, textbooks written in the Ukrainian language were used, but with an assimilative educational content. The use of the Ukrainian-language educational literature at private schools and an extracurricular environment confirmed the national worldview of youth through the study of the Ukrainian language and literature, their own history and geography, as well as the foundations of the Orthodox religion. School libraries, private bookstores, cultural and educational institutions were filled with the Ukrainian-language books owing to income from publishing houses and the "Native School" society. The authors of the Ukrainian-language school literature of the interwar period were the Ukrainian intellectual elite, mainly Galicians. Common features of a collective portrait of the authors are their pedagogical work, social activities and experience of an active participation in the Ukrainian national liberation movement. It was these common biographical guidelines that became decisive in the Ukrainian-language educational literature.

**Key words:** Poland, Volhynia Voivodeship, Ukrainian-language educational literature, interwar period, educational process, school, extracurricular education.

### УКРАЇНЬСЬКА НАВЧАЛЬНА ЛІТЕРАТУРА В ОСВІТНЬОМУ ПРОСТОРІ ВОЛИНСЬКОГО ВОЄВОДСТВА (1921 – 1939)

**Анотація.** Досліджено поширення українського навчального контенту в освітньому просторі Волинського воєводства та показано його вплив на формування національного самоусвідомлення й морально-етичних цінностей у молодого покоління. **Метою роботи** є аналіз різновиду й змісту україномовної навчальної літератури в державному та приватному волинському шкільництві, а також позашкільній освіті міжвоєнного періоду. **Методологію** складають принципи об'єктивності, історизму, системності, науковості. Застосовано метод аналізу та синтезу. **Наукова новизна** полягає у тому, що вперше досліджено практику використання української навчальної літератури в освітньому середовищі Волинського воєводства; з'ясовано шляхи надходження українських книжок до читачів; проаналізовано зміст української навчальної літератури; зроблено спробу визначення колективного портрета авторів української навчальної літератури. **Висновки.** У збереженні національної ідентичності українців важливу роль відіграла рідномовна дидактична література, яка була джерелом знань і патріотичного виховання в освітньому просторі Волинського воєводства. У державному початковому шкільництві послуговувалися підручниками з українською мовою навчання, але асиміляційним навчальним контентом. Використання української навчальної літератури в приватних школах і позашкільному середовищі утверджувало національний світогляд учнівської молоді через вивчення української мови та літератури, власної історії і географії, а також засад православної релігії. Наповнення українськими книжками шкільних бібліотек, приватних книгарень і культурно-освітніх інституцій відбувалося через надходження від видавничих осередків і товариства "Рідна школа". Авторами українознавчої шкільної літератури міжвоєнного періоду виступала українська інтелектуальна еліта, головно галичани. Об'єднавчими рисами колективного портрета авторського складу є їхня педагогічна праця, громадська діяльність і досвід активної участі в українському національно-визвольному русі. Саме ці спільні біографічні орієнтири стали визначальними у підготовці української навчальної літератури.

**Ключові слова:** Польща, Волинське воєводство, українська навчальна література, міжвоєнний період, освітній процес, школа, позашкільна освіта.

**The Problem Statement.** Political transformations of modern era caused a part of western Volhynia (in the Ukrainian transliteration – Volyn) to be part of the revived Second Polish Republic during the interwar period. In 1917 – 1921 the defeat of national state-building did not stop the development of the Ukrainian-language schooling, but on the contrary, in the new political realities, the Ukrainians' patriotic aspirations were strengthened against the background of Polonization and assimilation policy. During this period, the worldview

factors of a young generation of the Ukrainians were formed, which in the future ensured durability of the idea of the national liberation struggle. An important role in realization and preservation of the national identity was played by education/self-education through the study of the Ukrainian language and literature, history and geography of Ukraine, religion, and more precisely, their educational content. At the crossroads of Polish educational policy, the network of Utraquist schools increased in Volhynia Voivodeship, while the number of schools with the Ukrainian language of instruction was reduced to a minimum. The ban on teaching History and Geography of Ukraine as school subjects determined their study in an extracurricular environment, and therefore in the research we use the phrase “educational sphere”, going beyond the boundaries of school educational process. In order to reconstruct a holistic vision of the use of the Ukrainian-language books in Volhynia schooling, it is necessary to systematize them, analyze them, and find out the ways they were distributed among students/readers. The identified educational publications with official stamps of educational institutions, public institutions or collections of private collections of the State Archives of Volyn Region, the State Archives of Rivne Region, Rivne Regional Museum of Local History helped in the reproduction of the Ukrainian-language book supply and logical assumptions about their circulation in the educational sphere of Volhynia Voivodeship.

**The Review of Recent Researches and Publications.** Various issues of Ukrainian schooling in Volhynia Voivodeship are presented in the works of many historians, both domestic and foreign, among whom it is worth highlighting the following ones: M. Iwanicki (Iwanicki, 1975), R. Davydiuk and M. Kucherepa (Davydiuk & Kucherepa, 2001), Yu. Kramar (Kramar, 2015), V. Dobrochynska (Dobrochynska, 2016) and the others. A historiographic review of the national policy of interwar Poland in the western lands of Ukraine, which was also reflected in Volhynia school system, was carried out by V. Futala (Futala, 2017). The scholars I. Zuliak and A. Klish (Zuliak & Klish, 2019), L. Strilchuk and Ya. Yarosh (Strilchuk & Yarosh, 2021), V. Futala (Futala, 2023) did research on the interwar national and cultural atmosphere in the western Ukrainian lands, the influence of the Ukrainian intellectual elite on the formation of worldviews. The studies of I. Tsependa (Tsependa, 1993), P. Khmeliovsky (Khmeliovsky, 2004), Ya. Yatsiv (Yatsiv, 2004), O. Ruda and O. Pikh (Ruda & Pikh, 2023) deal with the struggle of the Ukrainians for their national rights, in particular defense of language issues in school policy. The educational studies of scholars showed the trends in the development of the Ukrainian schooling during the Polish period, but the educational content of textbooks remained beyond their focus. It is common knowledge that school literature is in scholars’ focus of various fields of scientific research. Textbooks studies develop at the interdisciplinary junction of history of pedagogy, bibliography, pedagogy and psychology. A comprehensive historical and pedagogical analysis of school educational literature in Ukraine was carried out by O. Zhosan (Zhosan, 2014, 2015). Analyzing the Soviet school literature, the author highlighted the main stages of its development, substantiated the system of scientific and methodological support at various historical stages, and also developed a model for the analysis of school educational literature, which was considered under the prism of pedagogical, social and bibliographic phenomena. Lviv scholar N. Zubko (Zubko, 2019) carried out a historical study of school literature in Ukraine using the example of the Soviet and era of independence textbooks on chemistry. N. Ihnatenko analyzed the methodical principles of the Polish grammar school textbook on history by T. Berholtz, introduced into school circulation in 1937 (Ihnatenko, 2000). The author noted that by the end of the 1930s, historical educational literature had turned into a source of knowledge and contributed to



the development of cognitive interest and creative activity of schoolchildren. Researches on the Ukrainian educational literature during the Polish period were presented by Galician scholars. In particular, M. Ilnytska (Ilnytska, 2012) substantiated the history and specificity of Galician chytanka of the early 1920s, and M. Nadraha (Nadraha, 2018) focused on the variety of books at Ukrainian school libraries in Lviv. Certain aspects of the research issue are analysed by V. Dobrochynska (Dobrochynska, 2021), in which there is elucidated the importance of the Ukrainian-language textbooks and literature in the study of Volhynia schooling during the interwar period.

Therefore, the lack of a comprehensive historical research in the academic output of scholars regarding the practical use of the Ukrainian-language textbooks at schools of Volhynia Voivodeship prompted the research on the Ukrainian-language book and its didactic analysis.

**The Purpose of the Research.** The main purpose of the article is to do research on the introduction of the Ukrainian-language textbooks in the educational sphere of Volhynia Voivodeship; to analyse the educational content and substantiate the importance of a native language literature in preserving the national identity of the Ukrainian people.

**The Results of the Research.** The Ukrainian Revolution of 1917 put an end to the dominance of Russian culture in Volhynia and contributed to the organization of Ukrainian schools, and thus, to the emergence of the Ukrainian-language educational literature. The reorganization of the education system during the period of national renaissance was recreated by the school inspector F. Pekarsky through the prism of his own experience, noting that for some time the Ukrainian language was taught in Russian in Rivne gymnasiums, accustoming the audience to Ukrainian, because students were mainly the Russians and the Jews: "...there was a kind of spectacle: "History of Ukraine" is taught in Ukrainian, the Ukrainian language – in Russian", and at school libraries of the former Russian schools "...there were no books in the Ukrainian language" (Dobrochynska, 2016, p. 197).

We assume that under the new Polish government from the beginning of the 1920s in Volhynia Voivodeship, the lack of textbooks in schooling was compensated by the first Ukrainian textbooks, printed as early as the time of Ukrainian statehood, in particular in the Kyiv publishing house "Ukrainian School" by such authors as Ya. Chepiha "Arithmetics at Primary School", "Arithmetic Rules", "Bukvar for Adults", "Chytanka for adults"; S. Cherkasenko "Beginning", "Grammar", "Native School. Chytanka", "The Most Necessary Spelling Rules"; V. Oliinyk "Course of Natural Science at Secondary Schools", Yu. Siry "About the World of God" (conversations on natural science)". "Vernyhora" publishing house compan published S. Rudnytsky's book "Geography at Primary School", I. Krypiakevych's book "History of Native Land", "Synopsis of the History of Ukraine", A. Khomyk's book "Brief Geography of Ukraine. Part 1, Part 2", "General Geography. Part 1–4", I. Rakovsky's book "Natural Science Textbook", A. Krushelnytskyi's book "Chytanka. Part 1–4", F. Schindler's book "Physics", some of which were found in the State Archives of Volyn and Rivne Regions and Rivne Regional Museum of Local Lore.

A nationally conscious Ukrainian elite arrived in Volhynia Voivodeship, among whom there were authors of the Ukrainian-language textbooks, for example N. Shulhyna-Ishchuk (1888 – 1979) (a sister of O. Shulhyn, the Minister for Foreign Affairs of the Ukrainian People's Republic), who, since 1927, taught Mathematics at Rivne Ukrainian private gymnasium, using her first Ukrainian-language textbooks – "Systematic Course of Arithmetic. Part 1, Part 2", which were published by the "Society of School Education" in 1917 – 1918 (Dobrochynska, 2016, p. 172). Another well-known political and public figure, the author

of educational literature, M. Levytsky (1866 – 1932), understanding an urgent need to teach the Ukrainian population in their native language, compiled “Ukrainian Grammar for Self-study” (Part 2), which was published at the publishing house of the Ministry for Railways in 1918. The textbook is addressed to a wide range of people who wanted to learn the Ukrainian language, because it was the lack of educational literature that hindered this process. In order to master Ukrainian grammar better, the author used a methodological approach based on the comparative characteristics of the Ukrainian and Russian languages (Levytsky, 1918). It should be emphasized that at that time M. Levytsky held the position of a chief sanitary doctor at Railways of Ukraine and headed a cultural and educational department of the Ministry for Railways. From 1927, he taught the Ukrainian language to students of Lutsk Ukrainian private gymnasium and later represented new textbooks.

In Volhynia Voivodship children of the Ukrainians went to public schools, which differed in the language of instruction: Polish, Polish with Ukrainian as a subject, and bilingual (Utraquist). Children of the Ukrainians went to private schools as well. In the national structure of the Voivodship, the Ukrainians accounted for about 70% of the total population, while the Poles (16.6%) were the smallest group compared to other regions. The Polish state declared support for national minorities in their right to a cultural development, in particular education in their native language, but at the same time, due to the increase of Utraquist schools, it pursued the policy of Polonization. In 1928, there were 1,144 schools in Volhynia, of which 750 were Polish, 390 – Utraquist, and only at four schools Ukrainian was the language of instruction. At the end of the 1930s, the result of H. Yuzevsky’s “Volhynia experiment” was the growth of Polish schools at which the Ukrainian language was the subject – 853 schools (121,455 students) and Utraquist schools – 529 (77,008 students). At the same time, there operated 494 Polish schools (74,520 students) and only seven Ukrainian schools (1,076 students) (Dobrochynska, 2016, pp. 21–27).

The first group of educational literature consists of the Ukrainian-language textbooks, which were provided to state primary schools. The educational programme of this type of school implemented basic, elementary skills in accordance with the age and psychological characteristics of students. In particular, Arithmetic textbooks – “Arithmetics” taught first-graders to perform simple mathematical operations with the help of a large number of black and white illustrations of living and non-living objects, and for the second-graders, the authors also prepared illustrative materials and short text tasks adapted to various situations of an everyday life (Rahunky, 1925; Rahunky, 1930).

Chytanka “Life and Work” for students of the 4th grade at primary school contained educational materials that involved implementation of cultural and political “Volhynia experiment” by H. Yuzevsky. On Page 1, students were introduced to a photo of the Lubart Castle in Lutsk, and the stories are devoted to love of their native land, student trips to the towns and picturesque recreations of Volhynia, the Cossack past, and outstanding historical figures. The leitmotif of the textbook is a call to work, because this is what the compilers of the textbook saw as the meaning of a human life. The educational content of 167 poetic and prose works is designed to bring up industrious young schoolchildren, which is confirmed by both title of the textbook and the subtitles – “Let us Get to Work”, “Mother’s Help”, “In the Kindergarten”. In the textbook, the theme of the harvest of grain crops can be clearly traced – “Harvest”, “Obzhynkova Song”, “Obzhynky Feast”, “Obzhynky in our Native Place and in Spala”. It is in the area of Spala, where the president’s family was on vacations in the summer, near Łódź, during the interwar period, a tradition was established to celebrate

the presidential obzhynky – a holiday of the end of the harvest, which included speeches by the president, representatives of a local self-government and concert by amateur groups. In this text, the authors had the goal of instilling a respectful attitude towards the state and its president, “who took care of welfare of the country” (*Zhyttia i pracia*, 1935, p. 10).

During the interwar period, the Ukrainian-language textbooks played an important role, influencing the development of national consciousness in students, which was one of the criteria for the national identity formation. According to a researcher I. Kresina, the main components of the national identity are awareness of a state-political, public and territorial community, a spiritual unity, an ethnic and historical kinship (*Tsyvilizatsiina identychnist ukrainstva*, 2022, p. 73). The second part of educational literature consists of the Ukrainian language and literature, history and geography of Ukraine, and religion, which were used at private schools and extracurricular education.

The libraries at Volhynia schools, bookstores and reading rooms of cultural and educational institutions were filled with books published by Ukrainian publishers in European countries, as well as publications by Galician authors who understood the importance of teaching students in their native language, instilling universal spiritual values and awakening national consciousness during the The Second Polish Republic. It is worth taking into account the historical experience of a national identity formation in Eastern Galicia, in contrast to Volhynia, in which the projection of the sub-Russian past was evident, in particular in the limited local publishing of Ukrainian school textbooks. The Galician Society “Native School” took on an important mission of bringing Ukrainian educational literature to Volhynia readers. From the 1919/20 academic year, books were sent from Lviv to Volhynia school committee, and in 1926 at the first September Congress of educators in Rivne, a decision was made to recognize it as the “main public authority” in the defense and spread of Ukrainian private schooling in Volhynia Voivodeship (*Yasinchuk*, 1931, pp. 214–215). However, despite the Polish government officials stopping its activities there, the Society continued to send books to Volhynia residents. It is known that through the mediation of a public and political figure R. Mohylnytsky (a Galician, a representative of UNDO; he ended up in Volhynia due to oppression by the Polish authorities), “Native School” provided primary school education by means of Ukrainian chytanka books (*Dobrochynska*, 2016, p. 156).

From the beginning of the 1920s, 36 chytanka books were published in Galicia, of which 16 were sent to primary schools, 18 – to secondary schools, and 2 – to teachers’ seminaries (*Ilnytska*, 2012, p. 219). Among the above mentioned, we will analyse the chytanka edition for the primary school, which was prepared by a Galician writer, a teacher under the pseudonym M. Kuzmova (*Koltuniak*) (1884 – 1922); it was used (rather in home use) by more than one generation of Volhynia children due to its national and patriotic content. The book contains 109 texts, without illustrative material, but a well-thought-out structure and content made it attractive for readers. The idea of forming children’s national self-awareness and patriotism, which is laid down in the first lines of the “Prayer”: “God the Great, God the One, bless our native land! All Your favours and all your bounties on our land, Father, give us! We are still small and weak, you give us courage and strength, so that we know how to give our lives for our native land at every moment!” (*Kuzmova*, 1920, p. 3). Compositionally, the texts of poems and stories are selected according to their content, which develops a worldview, educates moral, ethical and Christian virtues and reflects the following themes: love for Ukraine, respect for parents and family, folk traditions of celebrating Christmas and Easter, natural themes, and also contains works of a religious content – “Prayer before Studying”,

“Prayer after Studying”, “To the Holy Mary”. The thematic plots were successfully selected by sayings, proverbs, riddles and exercises that developed imagination, logical thinking and encouraged self-control.

The educational function was performed with the gymnasium “Chytanka” books of the Ukrainian writer, teacher, Minister for Education of the Ukrainian National People’s Republic (1919) A. Krushelnytsky (1878 – 1937), who made a significant contribution to the preparation of a didactic literature. “Chytanka” book for the 4th grade students of gymnasiums is addressed to high school students, and according to the stamp it became known that the book collection of Kremenets Theological Seminary provided future Orthodox priests with books that would form a historical memory and patriotic spirit. The literary content of “Chytanka” is systematized according to two main genres – poetry and prose. After analysing the content of the first part of the textbook, it becomes clear that the author grouped the texts into four thematic and genre subdivisions – epic, lyrical, didactic and dramatic poetry, which, in turn, are filled with genre diversity. For example, the subsection “Didactic Poetry” is represented by fables, satire, parables, epigrams, didactic lyrics, proverbs and riddles. By studying the works of Ukrainian classics, students got acquainted with the lives of outstanding creators – B. Lepky, A. Tchaikovsky, M. Hrushevsky, T. Shevchenko, I. Franko, M. Lazarevsky and other writers. The author devoted the section “History” to the Ukrainian past, which contains several essays by M. Hrushevsky – “Greek Colonies in Ukraine”, “Kyiv – the Centre of a Cultural Life in Ukraine in the 17th Century”, I. Krypiakievych – “Ancient Lviv”, “The Lviv Starovpigian Brotherhood in the 16th Century” and the work of the French linguist and historian Amedeu de Que de Saint-Emur “Anna Yaroslavna – Queen of France”. It is interesting that before the exposition of historical plots, the author focuses on significant events of the past with reference to the number of series of the textbook, in which the cognitive information is published. The summary list of the works of Ukrainian and world poets and novelists is arranged according to the same principle (Krushelnytsky, 1922). Schoolchildren of that time noted that “Chytanka” textbooks by A. Krushelnytsky for the 1st, 2nd and 3rd grades of gymnasiums were particularly popular among readers, their price was 14 zl. in Ukrainian bookstores in Rivne. Four Ukrainian bookstores operated in the largest city of Volhynia: three sold new books, and in the fourth, students had the opportunity to buy used the Ukrainian-language textbooks on Mathematics, Physics, Chemistry, and Logic at a lower price (Hutsuliak, 1976, p. 230).

To form skills of the Ukrainian language Grammar acquisition, several textbooks were used at Volhynia schools. The authors of “Short Grammar of the Ukrainian Literary Language” M. Uhryn-Bezgrishny (1883 – 1960) and A. Lototsky (1881 – 1949) – active participants in the national liberation struggle, public figures and teachers at Rohatyn private gymnasium, compiled the study guide, noting that it was addressed rather for a private use than for Ukrainian schools of the time, the number of which was reduced to nothing. Exercises developed practical skills in a correct use of words of different grammatical categories in simple and complex sentences, competent punctuation of various syntactic constructions (for example, in Paragraph 44, Paragraph 52). The paragraphs “Something about clarity, purity and impeccability in speaking and writing” focus on the improvement of students’ oral and written communication culture (in Paragraph 49), “Dictionary of Obscene Sayings” (in Paragraph 50), “Foreign, Unnecessary Words in the Ukrainian Language” (in Paragraph 51) (Uhryn-Bezgrishny & Lototsky, 1936). In favour of the fact that teachers of Rivne Ukrainian private gymnasium (1923 – 1939) used the educational content of this textbook is evidenced by the fact that the circle of nurturing the native language promoted the literary Ukrainian language among gymnasium students and

sought to make it pure of “all provincialisms and barbarisms” (Dobrochynska, 2016, p. 102), and this fully reflects the content of Paragraph 49.

In V. Bohatsky's school textbook “Grammar”, a considerable focus is on the problem of students' awareness of the structural and semantic features of various types of syntactic units (primarily simple, complex sentences), the constructions with direct and indirect speech are characterized. Fragments from the works of H. Kvitka-Osnovianenko, T. Shevchenko, P. Kulish, I. Nechui-Levytsky, P. Myrny and other classics of Ukrainian literature, as well as modern writers, are selected for the exercises. The didactic material of the textbook is aimed at improving the punctuation literacy of speakers (Bohatsky, 1929). The analysed textbooks deepened students' knowledge of a systematic organization of the Ukrainian language, contributed to normalization of oral and written speech.

Another edition – “Ukrainian Chytanka” by M. Levytsky – was primarily addressed to illiterate students of extracurriculum education courses, approved by Volhynia District Board of Polish Public School Teachers (Levytsky, 1930). The study guide, which is small in volume, realized a cognitive and practical goal – through the analysis of short texts of an instructive nature, folk sayings and catchphrases, the author suggested analyzing sentences (“1. On Content; 2. On *Etymology and Syntax*; 3. On Word Formation”). This methodological approach is aimed at mastering Ukrainian phonetics, vocabulary, phraseology and practice of the acquired knowledge.

Although History and Geography of Ukraine were not included in school curriculum, this did not stop the interest of the Ukrainians in studying these subjects. For example, the reading rooms of the Volhynia “Prosvita” were filled with Ukrainian historical and geographical literature, which laid the foundations of scientific knowledge and formed national consciousness. In this cultural and educational institution, readers got acquainted with the work of the Galician historian and a teacher J. Tchaikivsky (1876 – 1938) “World History”. The exposition of the key milestones of world history in Volume 2 “The Middle Ages” is also directed to the display of Ukrainian heritage – “Prehistoric Times of Ukraine Rus”, “Antis and Settlement of Ukrainian-Rus Tribes”, “The Beginnings of the Rus State”, “Volodymyr the Great and Yaroslav the Wise”, “The Decline of the Rus State”, “The Socio-Political Structure of the Ukrainian-Rus State”. Volume 3 “New Times” contained sections of the Cossack history – “The Uprising of Bohdan Khmelnytsky” and “The Ruin” (Tchaikivsky, vol. 2, pp. 244–245; vol. 3, p. 304).

Since 1934, a series of books “Children's Library” had been published in Lviv, in which artistic poetic and prose works for children of a younger age category were published. Aware of the importance of national and patriotic education from an early age, A. Lototsky prepared a popular history book “History of Ukraine for Children” in three parts dedicated to the heroic era of Ukrainian statehood (Part 1. Kyiv principality, 1934; Part 2. Galicia-Volyn state, 1934; Part 3. Cossacks, 1935; 2nd ed., 1939). The author reconstructed the historical past in an accessible popular science form, adhering to the problem-chronological principle. The books are decorated with an illustrative material by the famous Galician artist M. Fartukh (a pseudo of Ya. Fartukh-Filevych (1897 – 1979)). It is interesting that one of the books was written by the Ukrainian writer U. Samchuk, as evidenced by his bookplate, where his surname is indicated in the top line, and the sentence “Ukraino moya myla” is written in one word below (*according to the original*).

The textbook of the founder of Physical Geography and Anthropogeography of Ukraine S. Rudnytsky (1877 – 1937) “Fundamentals of Geography of Ukraine. “Physical Geography of Ukraine” (Rudnytsky, 1924) can be considered as one of the most thorough contemporary

Ukrainian-language manuals on Geography. The publication was based on the author's previous works, in particular "Short Geography of Ukraine. Kyiv, 1910", on separate chapters translated into German in Vienna (1916), English in New York (1918) and French in Bern (1919) of the same book and added new paragraphs on anthropogeographical aspects. S. Rudnytsky adhered to a popular style of presentation of the material with the vocabulary and dialects of the time. The first textbook focuses on the physical and geographical description of such regions of Ukraine as the Carpathians, Horhany and Velyky Dil, Crimean Verkhovyna, Podillia, Roztochchia, Volhynia, Pidliashsia, Polissia and the others. The natural and geographical description of the regions is based on a traditional plan – from geological and geomorphological features to natural landscapes (from a modern point of view – landscapes).

His second book "Anthropogeography of Ukraine" territorially covers ethnographic Ukrainian lands, "without regard to political borders", which makes it possible to "bind the Ukrainian land and the Ukrainian people into one whole, that lives in our imagination as "Unitary Ukraine" (Rudnytsky, 1926, p. 3). It is these words in the author's foreword that prompt a reader to think about independence and unity of Ukraine, about the Ukrainians as the titular state-creating nation. The book contains 30 chapters that cover the issues of population geography, ethnography, political geography, mineral resources, forestry, farming and agriculture, animal husbandry, industries and trade, etc. Three sections of the publication are devoted to economic development of Right-bank, Left-bank, and southern Ukraine. The manuals are designed to form a "geographic image" of Ukraine with its natural conditions and resources, population and ethno-national composition, economy and, most importantly, to show it as a prototype of an independent state, which the author managed to achieve.

Confessional memory is an important component for the national identity preservation. In the Polish Catholic state identification of the Ukrainians as the nation was also determined by a religious sign, namely, Orthodoxy. Religion lessons became an important component of Ukrainian schooling. Teaching the Law of God as a full-fledged subject was an indispensable aspect of religious education. The textbook "Law of God" for seventh-grade elementary schools contained general information about Orthodoxy, Holy books of Christians and was published in Warsaw. The educational material is grouped into three parts – "About Faith", "About Hope", "About Love". A thorough analysis by the authors of the ten commandments of the Law of God was aimed at inculcating universal spiritual values, because, as they finally note, so that knowledge about faith is not in vain, "the science of Christian faith and morality should be applied in practice to life" (Pidruchnyk Zakona Bozhoho, 1934, p. 82).

We cannot ignore the first methodological guide for teaching the Law of God, addressed to teachers of religion. It was written by an archpriest A. Abramovych, edited by I. Vlasovsky, the former director of Lutsk Ukrainian private gymnasium, and approved by Volhynia diocesan committee in 1937. "Methodics of the Law of God" is an original edition, distinguished by a high level of requirements for the pedagogical work: "Teaching religion, like any other education, is a kind of art. However, it is based on certain principles and rules that everyone who wants to devote himself to this work should know. Just as a musician cannot be a good virtuoso and a musician without having firmly mastered the technical principles of music, so a religion teacher cannot teach the Law of God well without knowing pedagogical and methodological principles and methods of teaching" (Protoierei Abramovych, 1938, p. 2). The content of the manual is divided into two parts – theoretical and practical, which, in turn, structurally covered the most important theoretical and methodological, didactic aspects and methodological techniques.

**The Conclusions.** Thus, in the educational sphere of Volhynia Voivodeship, private Ukrainian schools operated, which needed didactic literature in the native language. In this way, the Ukrainians defended their own language, history, religious memory, and, despite oppression and prohibition, formed the national consciousness. Taking into account the educational needs, the Ukrainian-language educational literature was aimed both at students of educational institutions and those who independently mastered didactic materials. School books were distributed through a network of Ukrainian private bookstores, cultural and educational societies – “Prosvita” and “Native School”.

The main task of the educational content of the Ukrainian-language textbooks was to lay the foundation of knowledge and establish national identity. The Ukrainian-language textbooks were written by representatives of the Ukrainian intellectual elite, who took an active part in the creation of the Ukrainian state in 1917 – 1921, and understood the importance of preserving national schooling in the Polish state.

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**“THE UKRAINIAN WOMEN’S UNION” IN RIVNE (1926 – 1938): STRUCTURE, PUBLIC ACTIVITIES, RELATIONS WITH THE GOVERNMENT**

**Abstract. The purpose of the research.** The article highlights the emergence, forms of activity, and circumstances of the women's organization "The Ukrainian Women's Union" winding up with its centre in Rivne and its branches in the territory of Volyn Voivodeship. It has been determined that the women's organization represented the socio-political and socio-cultural practices of women in Western Volyn. **The methodology of the research** is based on historical cultural, chronological methods, as well as methods of analysis and systematization, which made it possible to consider the conditions for the women's organization emergence, its relations with the Polish authorities, forms of work and significance to the national self-awareness of the local Ukrainian population. The method of prosopography has been applied in order to find out the names of the women's organization members. **The scientific novelty** of the article consists in the fact that the archival documents and interwar periodicals were found and researched, which made it possible to elucidate the peculiarities of the programme principles, forms

of work, relations with the Polish authorities of “The Ukrainian Women’s Union” with its centre in Rivne, and to find out the names of the Ukrainian women activists. **The Conclusions.** In the first half of the 1920s activation of the women’s movement in Western Volyn was associated with the women’s section emergence at povits “Prosvita”, and later on with the women’s organization functioning – “The Ukrainian Women’s Union” with its centre in Rivne and its branches, the founders of which were the local Ukrainian women and political emigrants of the Ukrainian People’s Republic. As a result of the Polish authorities ban on the Galician-Volyn women’s organization establishment, “The Ukrainian Women’s Union” in Rivne extended its influence only to Volyn Voivodeship, establishing a number of departments. “The Ukrainian Womens’ Union” in Rivne was aimed at the national activity, the organization kept in touch with “The Ukrainian Women’s Union” in Galicia, which led to persecution by the Polish authorities. Under conditions of the “Volhynia Experiment” brought in by Henryk Józewski and the idea of the “Sokal border” in opposition to “The Ukrainian Women’s Union” in Rivne, a pro-government women’s organization “The Ukrainian Women’s Union of Public Work” was founded in Lutsk as its centre. The situation, internal contradictions, as well as the passivity of a part of women, led to the final winding up of The Ukrainian Women’s Union.

**Key words:** women’s movement, “The Ukrainian Women’s Union” with its centre in Rivne, education, church, charity, Volyn, Galicia, the Second Polish Republic.

### **“СОЮЗ УКРАЇНОК” У РІВНОМУ (1926 – 1938): СТРУКТУРА, ГРОМАДСЬКА ДІЯЛЬНІСТЬ, ВІДНОСИНИ З ВЛАДОЮ**

**Анотація. Мета дослідження.** У статті висвітлено появу, форми діяльності, обставини закриття жіночої організації “Союз українок” з центром у Рівному та його філій на території Волинського воєводства. Доведено, що товариство репрезентувало громадсько-політичні та соціокультурні практики жіноцтва Західної Волині. **Методологія дослідження** базується на історико-культурному, хронологічному методах, а також методах аналізу і систематизації, що дало можливість розглянути умови появи жіночої організації, її взаємини з польською владою, форми роботи та значення для національної самосвідомості місцевого українського населення. Для з’ясування імен діячок товариства корисним був метод просографії. **Наукова новизна** статті полягає у тому, що віднайдено й досліджено архівні документи, міжвоєнну періодику, які уможливили показати особливості програмних засад, форми роботи, взаємини з польською владою “Союзу українок” з центром у Рівному, з’ясувати імена українських жіночк-активісток. **Висновки.** Активізація жіночого руху у Західній Волині у першій половині 1920-х рр. була пов’язана з появою жіночих секцій при повітових “Просвітах”, а згодом з функціонуванням власне жіночого товариства – “Союзу українок” з центром у Рівному та його філій, до заснування яких долучились місцеві українки й політичні емігрантки УНР. Унаслідок заборони польської влади на створення галицько-волинського жіночого об’єднання, “Союз українок” у Рівному поширював вплив лише на Волинське воєводство, заснувавши низку відділів. Національно орієнтована робота “Союзу українок” у Рівному, контакти із “Союзом українок” у Галичині призвели до переслідувань з боку польської влади. В умовах “волинського експерименту” Генрика Юзевського та ідеї “сокальського кордону” на противагу “Союзу українок” у Рівному виникла проурядова жіноча організація “Союз жінок українок громадської праці” з центром у Луцьку. Така ситуація, внутрішні суперечності, а також пасивність частини жіноцтва стали причиною остаточного закриття товариства.

**Ключові слова:** жіночий рух, “Союз українок” у Рівному, освіта, церква, благодійність, Волинь, Галичина, Друга Річ Посполита.

**The Problem Statement.** The interwar period opened up new opportunities for the women’s movement development, although the level of political self-realization of women in Volyn Voivodeship was low. Women consolidated in the women’s branches, which were founded in povits “Prosvita” societies in the first half of the 1920s. Despite the work in reading rooms and drama groups, the above-mentioned branches did not develop independent activities, which was connected with both everyday difficulties and pressure by the Polish

authorities. The Ukrainian women's issues, such as raising an educational and cultural level, spreading the ideas of the national cause, taking care and upbringing of children, actualized the emergence of "The Ukrainian Women's Union" organization with its centre in Rivne and its numerous branches.

**The purpose of the article** is to analyse the activities of "The Ukrainian Women's Union" in Rivne and its branches on the territory of Volyn Voivodeship through the prism of a personal factor and relations with the Polish authorities under the conditions of the "Volhynia Experiment" of the Voivode Józewski.

**The Review of Publications and Researches.** There were considered the formation and functioning of the Western Ukrainian women's movement, its implementation in the socio-political processes of the interwar period, the cooperation of women with political parties and public organizations, the contribution to the parliamentarism development and the Ukrainian society consolidation, the ideas of feminism in the works written by the following scholars: M. Diadiuk (Diadiuk, 2011; Diadiuk, 2017), T. Raievych (Raievych, 2001), O. Malanchuk-Rybak (Malanchuk-Rybak, 2006), B. Savchuk (Savchuk, 1998), I. Levchuk (Levchuk, 2018) and the others. However, the above-mentioned scholars focused on the gender movement primarily in Galicia, while the organizational activities of women in interwar Volyn remain covered insufficiently.

The articles written by A. Shvab and L. Shvab about Olena Levchanivska and her family (Shvab & Shvab, 2019), the work by R. Davydiuk about one of the leaders of the "The Ukrainian Women's Union" in Rivne Paraskeviia Bahrynivska became a useful source for writing the article (Davydiuk, 2014). The life of Maria Volosevych, Head of the branch of "The Ukrainian Women's Union" in Kremenets, was elucidated in the articles written by V. Manzurenko (Manzurenko, 2013), Ya. Marchenko and R. Davydiuk (Marchenko & Davydiuk, 2023). The women's participation in the theatrical and musical activities of interwar Volyn could be found in the articles written by A. Zhyvyuk and R. Davydiuk (Zhyvyuk & Davydiuk, 2019; Zhyvyuk & Davydiuk, 2020), an everyday problem of women-prisoners in the prisons of the Second Polish Republic was considered by O. Razyhraiev (Razyhraiev, 2020).

The relevance of the scientific article is also explained by the fact that there is confusion with the names of women's organizations that functioned in Volyn, in particular, "The Ukrainian Women's Union" in Rivne is called "The Ukrainian Women's Union in Volyn", while the pro-government "The Ukrainian Women's Union of Public Work" appeared in the documents under the abbreviated name with the centre in Lutsk. The source base of the scientific article consisted mainly of the archival documents stored in the State Archives of Volyn and Rivne regions (Ukraine) and the State Archives of Brest region (Belarus), as well as materials of interwar periodicals.

**The Results of the Research.** The intensification of the Ukrainian women's movement under the conditions of the Second Polish Republic was influenced by the public organizations development, political parties, as well as parliamentary elections and related civic activism. In interwar Volyn Olena Levchanivska was the only female senator representing the Ukrainians elected in the Parliamentary elections of 1922, who, after joining the Ukrainian Parliamentary Club, worked in the Foreign Affairs Committee of the Senate, in the international women's organization "The League of Peace and Freedom", carried out active educational, cultural and educational, charitable work, in particular as a member of the women's section of Lutsk "Prosvita". After completing her parliamentary mandate, O. Levchanivska focused on the educational work in her native village of Lyniv. The following figures worked in the women's

sections of “Prosvita”: Halyna Zhurba, Oleksandra Chernova (Zhyvotko), Hanna Karpynska (Karpinska) and the others.

The public work in Galicia was a role model to the Ukrainian women in Volyn, where the society “The Ukrainian Women’s Union” was founded at the Congress in Lviv on December 22–23, 1921, convened on the initiative of the women’s group Anna Barvinok the Ukrainian Pedagogical Society. There were 387 delegates from Galicia, Bukovyna, Volyn, Naddniprovyshchyna, as well as from Vienna, Prague, Warsaw, and Tarnow, who came to the Congress (Savchuk, 1998, p. 100). The activists stood for the unity of the women’s organization unanimously, objectively determined by their common interests at the forum. However, the Polish administration gave permission for the union to work only in Galicia, banning the Galician-Volyn women’s union. Taking into consideration the above-mentioned, there was a drastic need to create one’s own society in Volyn, which evolved on the basis of the Committee to help poor children at Rivne Ukrainian private gymnasium (State Archive of Volyn Region (SAVR), f. 46, d. 9, c. 4218, p. 36).

According to the permission of Rivne elders under No. 75749/26, the constituent assembly of “The Ukrainian Women’s Union” with its centre in Rivne was held on December 5, 1926 (State Archive of Rivne Region (SARR), f. 3, d. 1, c. 1, p. 1). In 1926, the Main Board and the supervisory board of the society were headed by Hanna Karpynska (Zhinochyi visnyk, 1927, 4 hrudnia, p. 4), the wife of the Head of Rivne “Prosvita”, the Ukrainian revolution participant, a lawyer Oleksandr Karpynsky. Stanislava Tomkovich was the Head of the women’s organization the next year (Rivenchanky pratsiuiut, 1927, 24 chervnia, p. 4) under the patronage of Maria Bulba (SARR, f. 30, d. 18, c. 1275, p. 2) (both figures were political emigrants, natives of Kyiv region). At that time, in Rivne there were also the following members of “The Ukrainian Women’s Union” Board Olena Kentrzhynska, a native of Podillia, the wife of the enlightener Anton Kentrzhynsky, and Paraskeviia Bahrynivska, who came from Kharkiv region. P. Bahrynivska gained experience in organizational work during the years of the first Russian revolution (she distributed leaflets, proclamations, spoke at rallies, for which she was arrested by the tsarist authorities). From the end of 1917, she worked as a husbandry manager at the Ministry for Justice of the Government of the Ukrainian People’s Republic (SARR, f. P-2771, d. 2, c. 2768, p. 14). She emigrated to Poland and lived in Warsaw with her husband Mykola Bahrynivsky, a lawyer, Minister of the Ukrainian People’s Republic government after the defeat of the revolution. In 1926, the couple moved to Rivne (Davydiuk, 2014, pp. 6–8).

“The Ukrainian Women’s Union” in Rivne extended its influence over the territory of Volyn Voivodeship and functioned according to the statute approved by the Voivode on July 11, 1927. There were the Chairman, three deputies, and eight members in the main Board of the organization, which was located in Rivne. The representatives of the Board chose from the members the heads of sections, the secretary, the treasurer, and the referents of the branches. The Board meetings were convened and conducted by the Chairman, her Deputy or the oldest member of the Board (SARR, f. 3, d. 1, c. 2, p. 1).

There functioned 4 sections in “The Ukrainian Women’s Union” in Rivne: religious humanitarian section, educational section, economic commercial section, labour industrial section in order to achieve the set goals (SARR, f. 3, d. 1, c. 1, p. 2). On the basis of regulations established by the Main Board, the work of the sections was directed to the spread of education among urban and rural population; opening a network of reading rooms, libraries; organization of theatrical performances, concerts, evening parties; publication of magazines; creation of

medical centres; organization of economic and industrial unions; providing a material and moral support to society members in case of unemployment or illness; creation of branches and groups in cities and villages of Volyn Voivodeship. The financial basis of the organization consisted of contributions, voluntary donations, legacies, assistance, income from parties, concerts, carnivals, performances (SARR, f. 3, d. 1, c. 2, p. 1). The financial condition of “The Ukrainian Women’s Union” improved after it received the property of Rivne “Prosvita”, which was banned by the Polish authorities. The women’s organization and Rivne Ukrainian private gymnasium became the property of the educational library and property worth PLN 20,652 (Bukhalo, 1994, p. 29). The society, a vocational school (bursa) for students of a private Ukrainian gymnasium and a library were located in Narodny Dim (People’s House). In general, the women’s organization had a good library, its own residence in Rivne for meetings and academies.

At the beginning of the work of Women’s Union in Rivne, its branches emerged in Zdolbuniv, Kovel (SAVR, f. 46, d. 9, c. 3937, p. 4), Kostopil, Kremenets, Volodymyr, Turiysk (SAVR, f. 46, d. 9, c. 4218, p. 36), Matsiyiv, Pochayiv (SAVR, f. 46, d. 9-a, c. 447, p. 105). In addition, the Union Women opened the reading rooms, founded choirs and theatre groups, and “zakhoronky” (kindergartens) for children in Rivne, Oleksandria, and Velyka Liubasha in Kostopil region (Ukrainets, 1929, 2 zhovtnia, p. 5). Each community, with the permission of the Board, could form social groups, however, on the condition that at least 10 local Ukrainian women expressed such a desire (SARR, f. 3, d. 1, c. 2, p. 1).

In March of 1934, in “The Ukrainian Women’s Union” there were 166 members with its centre in Rivne, its departments were active in Kovel, Volodymyr, Matsiyiv, Kremenets, Pochayiv, Pidluzhne, Mylostov, Danychev, Samostrily, Zdolbuniv, Mezhyricha (SARR, f. 3, d. 1, c. 2, pp. 16–17), Basiv Kut (SARR, f. 3, d. 1, c. 2, p. 63), the group functioned in Turiysk, Shaynim, Okunin, Berezhitsi, the libraries worked in Spasiv, Zdovbytsi (SAVR, f. 46, d. 9-a, c. 447, pp. 71, 105). In 1938, the organization united 479 people, had influence in Kostopil, Kovel, Rivne, Volodymyr, and Zdolbuniv povit. During ten years of work, the women’s union founded 17 reading rooms (SARR, f. 3, d. 1, c. 2, pp. 1–2).

Kovel branch of Rivne headquarters of “The Ukrainian Women’s Union” was founded by the women’s organizational meeting on December 11, 1927. The following members of the temporary Board were elected: Matsiuk – the Chairman, Kolendova and Koss – the Deputies, M. Bakhovets-Nedolia – the Secretary and the Treasurer. At the meeting, the plan for the celebration of the writer O. Kobylanska was discussed and the goal was set to join all events organized by other Ukrainian organizations (O. K., 1927, 20 hrudnia, p. 3). Subsequently, Kovel branch of the women’s organization was headed by Oleksandra (Lesia) Pidhirska (a wife of Samiilo Pidhirsky, the Ukrainian Central Council member, a lawyer, an ambassador), her Deputy was Yelyzaveta Tarasevych, the Secretary – Nataliya Zybenko (a daughter of Ambassador Mykola Pyrohov, a wife of the cooperator, an engineer Oleksandr Zybenko) (SAVR, f. 46, d. 9-a, c. 447, p. 97). In 1937, on the initiative of O. Pidhirska there was held a meeting dedicated to the memory of the Ukrainian insurgents, who died near Bazar (U Polshchi (1937, 26 hrudnia, pp. 28–29). On May 25, 1938, she presented an essay devoted to the life and work of Symon Petliura. The present women decided to reread and discuss the works dedicated to him during the week in memory of the Chief Otaman (Richnytsia smerty, 1938, 26 chervnia, p. 9). According to the reports of Volyn Voivodeship Government, dated March 12, 1938, it was recorded that Kovel branch had influence on a significant part of the intelligentsia, numbering 72 members (SAVR, f. 46, d. 9-a, c. 447, p. 72).

Since 1929, Volodymyr branch of the women’s society was headed by Nina Richynska, the wife of Arsen Richynsky, the founder of Volodymyr “Prosvita”, a doctor, the organizer of the Ukrainian Church Congress in Lutsk. Mother’s Day was organized owing to the efforts made by the administration, at which a choir performed, a conductor was A. Richynsky, and a speech was delivered by O. Levchanivsky, the enlightener (State Archives of Brest Region (SABR), f. 1, d. 9, c. 654, p. 5). In 1938, there were 44 members, who belonged to the branch (SAVR, f. 46, d. 9-a, c. 447, p. 75).

Olha Ohorodnyk (a wife of Oleksandr Ohorodnyk, a public figure, an ambassador to the Diet of the 5th convocation (1938 – 1939)) worked in Zdolbuniv centre (SARR, f. 156, d. 2, c. 311, p. 22), a doctor Iryna Prisievska (SARR, f. P-2771, d. 2, c. 3662, p. 16), later on it was headed by Oleksandra Baidak (a wife of Ivan Baidak, the UNR Army sotnyk) (SAVR, f. 46, d. 9-a, c. 447, p. 31).

Maria Cherkavska headed Kremenets branch of the women’s society initially (the wife of Mykhailo Cherkavsky, Volyn provincial Commissar for education of the Ukrainian People’s Republic, an enlightener, a senator of the first convocation) founded on March 13, 1929, later on the leadership passed to Maria Volosevych (SARR, f. 3, d. 1, c. 2, p. 45) (a wife of Oleksandr Volosevych, the lieutenant colonel of the UNR Army) (Marchenko & Davydiuk, 2023, p. 51, 57). M. Volosevych revived the work of the branch, she had experience in revolutionary and cultural and educational activities, as a delegate of the First Military Congress, an assistant to the general secretary of education I. Steshenka, an employee of the cultural and educational department of the headquarters of the Active Army of the Ukrainian People’s Republic (Manzurenko, 2013, pp. 299–301). Kremenets branch had its own residence, a library (about 600 books) and a reading room (Zakryly filiui Soiuзу Ukrainok u Kremiansi, 1938, 12 sichnia, p. 4).

The Head of the branch in Kostopil was elected a doctor, an employee of the military hospital under the Army of the Ukrainian People’s Republic, Hanna Roschynska, who tried to spread the work of the society to the entire county. The activist of the branch organized Shevchenko Days, started women’s tailoring and sewing courses, activated cultural and educational life, and supported the Ukrainization of the Orthodox Church in Poland. The active public work of the spouses Hanna and Peter Roschynsky became the basis for their persecution by the Polish police and their dismissal from the position of doctors. In 1938, the Roschynsky were forced to leave Kostopil and move to Kremenets, where Hanna’s relatives lived (Rudyk, 1953, pp. 59–60).

Charity was an important part of women’s life: taking care of children, helping them pay for education, arranging free lunches. On May 8, 1927, women from the Soviet Union came up with the idea of a material support for students and holding collections for the benefit of this educational institution at a conference in the Rivne Ukrainian private gymnasium. “The Ukrainian Women’s Union” in Rivne initiated the work of the canteen, Christmas tree in the Ukrainian gymnasium, the collection of donations for the Plast home in Lviv (SARR, f. 3, d. 1, c. 1, pp. 3–4).

The society helped the Ukrainian emigrants, who experienced significant financial difficulties: there was the lack of shoes, clothes, and other essential items. On February 4, 1927, the meeting of “The Ukrainian Women’s Union” in Rivne decided, considering the a difficult situation of the families of women interned in Kalisha camp, to collect and send various things for them. It was decided to organize sewing training for women, and the funds collected by the Klevan group raised to 5 zl that passed on to the children of Nadiya

Vrotnovska at the Board meeting on December 5, 1934 (SARR, f. 3, d. 1, c. 2, p. 13). It should be mentioned that after the death of Kostiantyn Vrotnovsky-Syvoshapka, a member of the Central Ukrainian Council, Head of the Military Veterinary Department of the Ukrainian General Military Secretariat, a colonel of the UNR Army in Rivne on April 2, 1929, his wife was left with four minor children – Hordiy, Tetiana, Olha and Bohdan.

The members of the women's society helped with the topical problems of life in the region. In April of 1933, they joined the work of the temporary Committee in order to help flood and hail victims in Polissia, donating the collected funds to compensate for a material damage caused by natural disasters. The activists of the organization helped female prisoners, sending Easter food gifts to Rivne prison (SARR, f. 3, d. 1, c. 2, pp. 4, 8).

The activists conducted lectures on various issues, prepared business courses, and organized concerts. It became traditional for women to hold a Christmas tree events with gifts and sweets for children, vechornytsi (traditional gatherings with songs, rituals) on St. Andrew's Day, St. Nicholas's Day, and handing out gifts to children. There were held holidays dedicated to Mother's Day, the "academy" in honour of T. Shevchenko, other Ukrainian writers, and commemoration of important historical events systematically. On December 15, 1936, there were held events on the occasion of the Ukrainian writer's death, Vasyl Stefanyk owing to the initiative of Zdolbuniv branch of the women's society. P. Bahrynivska prepared a summary and made a speech dedicated to his work, noting that V. Stefanyk was one of the best connoisseurs of the Ukrainian peasant soul. There were read the excerpts from V. Stefanyk's works at the gathering, each of which was explained (Zdolbuniv – Stefanykovi, 1937, 1 sichnia, p. 10). Owing to the efforts of the above-mentioned branch, a service was held in St. Katerynivska Church in Zdolbuniv on the occasion of Mykhailo Hrushevsky's death on December 2, 1934.

The women of the union wrote a letter to the Sejmik as they acknowledged the importance of cooperative work: "The cooperatives fight against laziness, because they force people to take part in the meetings, gatherings where people give pieces of advice, calculate, send letters to the world...The cooperatives are the good to the whole and the good to the individual" (SARR, f. 3, d. 1, c. 2, p. 32). The members of the society focused on the educational work: "We need to distribute books through various readings, performances and "book holidays", we need to breathe life into our library, we need to make every effort so that our reading rooms in the villages could fulfill their tasks properly" (SARR, f. 3, d. 1, c. 2, p. 29).

The opening of kindergartens was a crucial aspect of the women's organization activities. There were three things, which seemed to be necessary in order to make the above-mentioned happen: desire of parents, availability of funds and selection of specialists. In June of 1927, a kindergarten at Narodny Dim (the People's House) opened in Rivne, and there were 22 children enrolled in it (Rivenchanky pratsiuiut, 1927, 24 chervnia, p. 4). Women could not handle the work of the kindergarten during the year, hence, with the help of the authorities, they established summer temporary kindergartens. Yelyzaveta Zinchenko, a native of Poltava region, a wife of a teacher and artist Petro Zinchenko, worked as a kindergarten teacher in Rivne (Davydiuk, 2016, p. 445).

There was organized a Ukrainian kindergarten for 80 pupils (both local children and children of emigrants) in Kovel by the efforts of various Ukrainian societies, including the branch of "The Ukrainian Women's Union" in 1937. Children spent time and study in the parish kindergarten when the weather was fine, and children were in the guardhouse at the church or in the premises of "The Ukrainian Women's Union" when the weather was gloomy.



Children were served free breakfasts and lunches, and brought up in the Ukrainian spirit. At the end of the summer, on the occasion of the closure of the institution, children held a party with a play, songs, dances, recitations and various entertainments (*U dytiachomu sadku v Kovli*, 1938, 10 lypnia, p. 22).

Despite the success and achievements of "The Ukrainian Women's Union" in Rivne and its branches, the work of the organization was complicated by internal difficulties, contradictions, and differences in political sympathies: some of the centres were inclined to the nationalist views, some sympathized with the socialist ideas (SARR, f. 33, d. 4, c. 69, p. 284). The first internal crisis of the organization arose at the beginning of the 1930s, when the idea of self-liquidation of the union appeared and the leadership was re-elected at the extraordinary general meeting on October 31, 1931. There were two candidates, who applied for the position of Head of the Board: Ivanna Skrypnyk (a wife of the UNR activist Ambassador Stepan Skrypnyk) and Paraskeviia Bahrynivska (a wife of the UNR activist Mykola Bahrynivsky). The general meeting gave preference to P. Bahrynivska, who undertook not only to preserve the organization, but also to intensify its work (Davydiuk, 2016, p. 446). There were the following members of the Board: Kentrzhynska, Roshchynska, Kulyi, Bulba, Zinchenko, as well as there were the following members of the audit commission: Ishchuk, Vrotnovska, Tomkovych (A. V., 1931, 15 lystopada, p. 4). P. Bahrynivska was elected again as the Head of the Board at the general meeting of the society on December 2, 1934. However, the society declined gradually, its work slowed down.

We should make an assumption regarding the "fueling" of the internal contradictions in the society, due to the formed group by P. Pevny at the time, which was close to the Voivode, Henryk Józewski, there was launched the initiative on the creation of a pro-government women's organization, probably planning to do it by transforming "The Ukrainian Women's Union" in Rivne. Owing to the influence of the "Volhynia Experiment", two currents emerged in the women's environment at the beginning of the 1930s: the pro-government one, whose representatives focused on unconditional cooperation with the Polish administration, and the national democratic one, whose members tried to distance themselves from such cooperation and continue keeping in touch with the Ukrainian women from Galicia. The representatives of the first current were mainly the wives of the figures of the VUO, regional party of the VUO, the representatives of the second current, in particular the Head of the Union P. Bahrynivska, supported the UNDO programme and contacts with the Galician women (SARR, f. 30, d. 18, c. 1274, p. 6).

As a result of failure regarding "The Ukrainian Women's Union" transformation into a pro-government institution with its centre in Rivne, another organization emerged in contrast to it, which was called "The Ukrainian Women's Union of Public Work" in Lutsk with the abbreviated name UWV (The Ukrainian Women's Union of Volyn) in 1932 (Statut, 1932, 15 serpnia, pp. 5–7). The name of the new organization was consonant with the Polish women's organization "Związek Pracy Obywatelskiej Kobiet", which emerged in order to support the policy of J. Piłsudski in Warsaw in 1928 (SABR, f. 1, d. 10, c. 150, p. 4). The organization formed in Lutsk, which initially operated as a women's section under the Council of the VUO (*Zhinocha sektiia Rady VUO*, 1933, 16 kvitnia, p. 3), was headed by Vira Maslova, a native of Vinnytsia, the wife of the VUO member, Ambassador Mykola Maslov. Yuliya, the wife of the Governor Józewski, supported the women's organization in Lutsk in every possible way (Nekroloh, 1939, 28 travnia, p. 3).

The contradictions between the two women's groups only increased over time. "The Ukrainian Women's Union" in Rivne established contacts with the women's section of "Silsky

Hospodar” in Lutsk, but in every possible way bypassed communications with the pro-government “The Ukrainian Women’s Union of Public Work” in the voivodeship centre. The organization with its centre in Rivne continued communication with women’s organizations of Eastern Galicia for mutual assistance and sharing experience. On December 2, 1934, the annual meeting in Rivne was attended by representatives from Lviv, in particular, Senator O. Kysilevska. P. Bahrynivska from Rivne, O. Pidhirska from Kovel, M. Volosevych from Kremenets represented “The Ukrainian Women’s Union” with its centre in Rivne at the women’s Congress in Stanislaviv (SAVR, f. 46, d. 9-a, c. 447, p. 29). The Head office of the women’s organization in Rivne appealed to “The Ukrainian Women’s Union” in Lviv with a request to send an instructor in cutting and sewing, to the “Sich” society in the USA – to help with donations. Organizationally, the women’s organisation with its centre in Rivne was significantly inferior to the Galician “Ukrainian Women’s Union”: “Volyn women have just woken up, but they are ready to walk side by side with you under your ideological leadership,” – wrote P. Bahrynivska (SARR, f. 3, d. 1, c. 1, pp. 5–6).

Due to such work of the women’s organization, especially contacts with the Galician society, its activists were under pressure of the Polish authorities, because they did not fit into the formula of the “Sokal Border”. Women had to work under the supervision of the police and starost, undergo inspections and listen to threats to ban the organization. In 1933, in Volodymyr the starostvo forbade the local branch of “The Ukrainian Women’s Union” to celebrate T. Shevchenko’s anniversary, to organize performances of the drama circle, O. Tsynkalovsky was forbidden to deliver speech on the topic “The Ukrainian Nobility of the 16th – 17th centuries” (V tenetakh “ukrainofilstva”, 1933, 1 lypnia, p. 3).

The starostvo sent a notice about the liquidation of Zdolbuniv branch of “The Ukrainian Women’s Union” on November 10, 1936. The authorities explained that according to the law, the number of female members of the branch could not be less than ten. Since six women did not pay contributions in 1936, they were expelled from the organization automatically. On November 23, 1936, the Board appealed to Volyn Voivodeship with a protest, stressing out that, first of all, in the branch there were 20 members, and second of all, according to the statute, only the Board could revoke membership in the community. Persecution of members of other branches continued: on December 30, 1937, the Board of the branch of “The Ukrainian Women’s Union” in Kremenets received a letter in which the starostvo demanded to quit their activities. However, women were able to protest the above-mentioned decision (Zakryly filiiu Soiuzu Ukrainok u Kremiansi, 1938, 12 sichnia, p. 4).

P. Bahrynivska prepared an appeal to the Ukrainian parliamentarians with a request to protect the women’s organization from the onslaught of the Polish authorities due to the complication of the situation in February of 1937. However, the Main Board rejected the offer, explaining that during the celebration of the 10th anniversary of “The Ukrainian Women’s Union” it is not necessary “to exacerbate the already strained relations with the local authorities” (SARR, f. 3, d. 1, c. 1, pp. 6–7). Despite the loyalty of the Board of the women’s union, the Polish administration forbade the creation of new branches, organizing courses, holding events and, finally, announced preparations for the final closure of the society.

“The Ukrainian Women’s Union” in Rivne and its branches and groups were banned after another inspection at the end of May of 1938. The last audit, carried out simultaneously in the premises of the headquarters, in the branches and a private residence of the Head of the organization P. Bahrynivska lasted all night. The official reasons for the closure were the following: lack of cash books, balanced budgets, which made it difficult to control

the authorities; the presence of minors in the members list of the union; belonging to the society of women, who were arrested in the past for participating in illegal organizations; cooperation and ideological ties with the Galician women’s society (Rozviazyaly Volynskiy Soiuz Ukrainok, 1938, 18 chervnia, p. 7).

The Main Board of “The Ukrainian Women’s Union” in Rivne did not accept this state of affairs and turned to Volyn Voivodeship Administration to appeal to the Ministry for Internal Affairs to revoke the decree, issued by Rivne povit starosta regarding winding up the organization on June 8, 1938 (SAVR, f. 46, d. 9-a, c. 447, p. 42). Although there was no official response to the members of the Ukrainian Women’s Union.

It was obvious that the authorities had no intention of resolving the issue in favour of the Ukrainian women’s organization. P. Bahrynivska, under the pressure of circumstances, refused to lead the organisation, which complicated the situation. The efforts of other members of the Main Board, in particular Antonina Horokhovych, to defend the rights of the women’s organization were not successful.

**The Conclusions.** The prohibition of the Polish authorities to extend the activities of the Galician “Ukrainian Women’s Union” to the territory of Volyn Voivodeship prompted women from Volyn to establish a similar organization with a similar name in Rivne, under which a number of branches emerged in the towns of the region. Political emigrants of the Ukrainian People’s Republic joined the activities of the women’s society actively, who, along with local Ukrainian women, intensified the society operating, filled it with a new content, spread the Ukrainian education and culture, engaged in charity, protection of the Orthodox Church, founded libraries, theatre groups, etc.

Under the conditions of the “Volhynia Experiment” of Voivode Henryk Józewski, the Polish authorities began to restrict, later on banned the activities of “The Ukrainian Women’s Union” with its centre in Rivne and its branches, as they had previously banned “Prosvita”, “Silsky Hospodar”, the Ukrainian cooperatives of Galician origin. These prohibitions fit perfectly into the tactics of implementing the idea of the “Sokal Border”, the purpose of which was to prevent the activities of those organizations that maintained contacts with the Ukrainian associations of Galicia. Instead, the Ukrainian pro-government institutions were formed in order to fill the created vacuum, with the voivodeship administration support. In Lutsk, the wives of pro-government Ukrainian activists initiated the formation of a new women’s organization “The Ukrainian Women’s Union of Public Work”, which spread the idea of the Ukrainian-Polish cooperation and was supposed to substitute “The Ukrainian Women’s Union” in Rivne.

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**STEPAN SHAKH'S ACTIVITIES AS THE DIRECTOR  
OF THE PRZEMYŚL STATE GYMNASIUM (1932 – 1939)**

**Abstract.** *The purpose of the article is to analyse the activities of Stepan Shakh as the director of the Przemyśl State Gymnasium, to outline the main areas of the school administration under his chairmanship. The research methodology is based on the principles of historicism, the use of general scientific (generalization, typology) and special scientific research methods, in particular comparative and historical, historical and systemic, critical analysis of sources. The Scientific Novelty of the Research.* *On the basis of a complex analysis of the memories of the figures who worked and studied at the Przemyśl Gymnasium during the outlined period, the main directions of Stepan Shakh's administrative work as the director of the educational institution have been highlighted. In particular, the main reorganization steps in connection with the reform of school education have been defined. The focus is on the development of cultural and educational, national and sports life of students. Based on the studied materials of the press and historiography, the authors came to the conclusions:* Stepan

*Shakh, as the director of the Przemyśl Gymnasium, managed to establish the educational process in accordance with the school education reforms of the 1930s. The director responded to the challenges of the times and introduced a number of innovations related to the professional and technical specialization of education (opened workshops, driving courses, etc.), continued the development of traditional educational areas. The head of the gymnasium cooperated with the Ukrainian public figures of the region, the society of parents and graduates, who supported charitable initiatives, cultural, sports and spiritual life of the gymnasium students.*

**Key words:** *Przemyśl State Gymnasium, Director Stepan Shakh, educational reform of the 1930s, educational and educative process.*

## ДІЯЛЬНІСТЬ СТЕПАНА ШАХА НА ПОСАДІ ДИРЕКТОРА ПЕРЕМИШЛЬСЬКОЇ ГІМНАЗІЇ (1932 – 1939)

**Анотація. Мета дослідження.** Проаналізувати діяльність Степана Шаха на посаді директора Перемишльської гімназії. Виокремити основні напрями роботи шкільної адміністрації за його головування **Методологія дослідження** базується на принципах історизму, застосуванні загальнонаукових (узагальнення, типологізація) та спеціально-наукових методів дослідження, зокрема, порівняльно-історичного, історико-системного, критичного аналізу джерел. **Наукова новизна.** На основі комплексного аналізу спогадів діячів, які працювали та навчалися у Перемишльській гімназії в окреслений період, виділено основні напрями адміністративної роботи Степана Шаха як директора цього закладу освіти. Зокрема простежено основні реорганізаційні кроки у зв'язку з реформою шкільної освіти. Також звернуто увагу на розбудову культурно-просвітнього, національного та спортивного життя учнів. **Висновки.** Степан Шах на посаді директора Перемишльської гімназії зумів налагодити освітній процес відповідно до реформ шкільної освіти 1930-х рр. Директор реагував на виклики часу та впровадив низку нововведень, які стосувалися професійно-технічної спеціалізації навчання (відкрито робітні, водійські курси тощо), продовжив розвиток традиційних освітніх напрямів. Керівник гімназії співпрацював з українським активом регіону, товариством батьків та випускників, які підтримували добротні ініціативи, культурне, спортивне і духовне життя гімназії.

**Ключові слова:** *Перемишльська гімназія, директор Степан Шах, освітня реформа 1930-х рр., навчальний та виховний процес.*

**The Problem Statement.** In 1848, after the “Spring of Nations”, the Habsburg monarchy intensified democratic transformations, declared support for the educational and cultural sphere of “non-state nations”. Owing to the efforts of the representatives of the “Main Ruthenian Council” in the eastern part of Galicia, the 8-grade gymnasium with German as the language of instruction was established, during the period of 1849 – 1856 the Ukrainian language became a compulsory subject at schools (Zahajkevych, 1961b, pp. 225–256)

The constitutional reforms of the 1860s culminated in the formation of the dualistic Austro-Hungarian monarchy, which enshrined the “Basic State Laws” of December of 1867. The “December Constitution” was based on the norm of the equality of all citizens before the law, so the state defined equality in the use of all the languages of the peoples who lived in the Empire. However, in practice, these resolutions on national equality depended on the situation of specific peoples in the regions. A gradual approval of “Polish autonomy” took place in Galicia (Leshchak, Lepekh & Haratyk, 2023, p. 59), which included, among other possibilities, the granting of official status to the Polish language in the region, Polonization of education took place (Arkusha, 2016, pp. 69–71; Yanyshyn, 2017, pp. 9–10). In 1867, the Galician Regional School Council was established – a coordinating body for managing the education system, primarily responsible for public and secondary schools (Lukaniuk, 2007, p. 143). The Regional School Council succeeded in increasing the number of schools, but due

to the political dominance of the Poles, instead of the German and Ukrainian languages, Polish was introduced at schools (Lukaniuk, 2007, pp. 144–145; Zahajkevych, 1961b, p. 256).

In the second half of the 19th century the Ukrainian church (Bystrytska & Hrabets, 2023, pp. 109–110) and political figures made a lot of efforts to expand the network of Ukrainian educational institutions (Bortnik & Artymyshyn, 2022, p. 105; Strilchuk & Yarosh, 2021, p. 130). The contribution of Yulian Romanchuk, the ambassador of the Galician Sejm, was significant. During the period of 1884 – 1887, the activist submitted a number of petitions for the establishment of the Ukrainian gymnasium in Przemyśl, after long disputes the Sejm agreed to establish the department “with the Ruthenian language” (Ukrainian) at the “imperial royal gymnasium” with Polish as the language of instruction (Zahajkevych, 1961b, p. 262; Shakh, 1977, p. 50). On July 29, 1887, Emperor Franz Joseph approved a government Decree, and in 1888 he appointed Hryhoriy Tsehlynsky as a temporary administrator (Shakh, 1977, p. 22). Gradually the number of students and teachers increased in the 1895/1896 school year, 8 grades were formed. In 1895, the authorities issued Decree on the separation of classes with the Ukrainian language of instruction into an independent gymnasium, H. Tsehlynsky was appointed a full-time director of the new educational institution (Shakh, 1977, p. 23).

After World War I and since the formation of the Polish state, the problem of schooling became acute. As Oksana Ruda, a researcher of the educational policy of the Second Commonwealth of Nations, emphasized, the regional authorities began making changes to the education system even before the official accession of Galicia to Poland in 1923, implementing “the Polonization idea regarding the non-Polish population of Galicia, which could threaten the stability of the state” (Ruda, 2016, p. 92). In general, after 1918, secondary education was represented by 6 state gymnasiums (founded before the war): two institutions in Lviv, in Kolomyia, Stanislaviv, Przemyśl, and Ternopil. There were also classes with the Ukrainian language of instruction in Stryi and Berezhany, seven private gymnasiums with the Ukrainian language of instruction in Lviv, Przemyśl, Yavoriv, Rohatyn, Chortkiv, Dolyna, Horodenka, three private bilingual Polish-Ukrainian schools (in Turka, Yavoriv, Rohatyn) (CSHAUL, f. 179, d. 1. c. 27, p. 19).

Changes in the school system of the Republic of Poland began in 1919 with the introduction of Decree on the compulsory education of children (from 7 to 14 years old in seven-year general (public) schools). In 1921, the division into school districts was introduced. In February of 1922, the Sejm passed a law entrusting the establishment and further maintenance of general schools to local self-government bodies. In 1924, the Ministry for Religion and Public Education introduced the Grabski Law, which established Polish as the state language in government, and it was allowed to use the language of communities in localities, and in schooling, parents were given the choice of the language of instruction and the establishment of their own educational institutions, if the number of national minorities was 25% of the total number. However, in reality, the implementation of Utraquinist schools took place, this process was contested by the Ukrainian public, in particular the association “Native School” (CSHAUL, f. 206, d. 1, c. 1951, p. 8; Levandovska, 2015, pp. 93–94). Gymnasiums formed the middle link of the educational system. Another important legal act within the framework of the 1932 reform was the law of March 11, 1932. This law mainly provided that instead of eight-year gymnasiums, four-year gymnasiums and two-year lyceums were established (Shlikhta, 2014, p. 196).

In 1930, during the period of political transformations in the Polish state and reforms in the school system, owing to the activities of public figures, cultural and educational societies, a network of educational institutions was preserved. Przemyśl and its educational institutions



played an important role in this network as a centre of the Ukrainian social and political life. In 1932, Stepan Shakh was appointed a director of the Przemyśl Gymnasium (a participant in the liberation struggles after World War I, a secretary of the Regional Main Department of the “Prosvita” Society for several years in Lviv, an editor of the first post-war calendars of “Prosvita”, a co-editor of “Narodna Osvita”) (Shakh, 1977, p. 49; Zaiats, 1938, p. 20). How was S. Shakh characterized by his contemporaries? Bohdan Zahaikivych characterized him as “an energetic, determined man”. The new leadership headed by S. Shakh faced a number of challenges, as the activist himself noted, “he took over a heavy legacy” (Shakh, 1977, p. 51). In particular, recruitment of students, bureaucratic work related to the adjustment of educational process, recruitment of new personnel, collection of funds for the care of poor high school students, organization of cultural, educational, national and sports life of students.

**The Review of Recent Publications.** Organization peculiarities of the educational system in Galicia in the 19th century through the prism of iconic institutions, such as the Galician Regional School Council, are highlighted in the publications of Khrystyna Moriak-Protopopova, Serhiy Lukaniuk. The national educational policy of the Second Polish Republic, its main development trends with an analysis of the regulatory framework and the functioning of educational institutions were researched by Oksana Ruda comprehensively (Ruda, 2017a; Ruda, 2017b, pp. 337–353; Ruda, 2017c, pp. 573–614), Mykola Halai (Halai, 2012a, pp. 40–44; Halai, 2012b, pp. 281–286), Mykola Haliv and Vasyl Ilnytskyi (Haliv & Ilnytskyi, 2019).

Various vectors and aspects of the political, cultural and educational life of the Ukrainian people of Przemyśl are outlined in the collections of scientific works and materials of the International Scientific Conference “Przemyśl and Przemyśl Area during the Ages”. The articles by Stepan Zabrovarny (Zabrovarny, 2003, pp. 7–36), Ihor Soliar (Soliar, 2003, pp. 124–132), Kvitlana Hrynkiv, Bohdana Zavadka (Hrynkiv & Zavadka, 2001, pp. 212–220), Yelysaveta Dombrovska (Dombrovska, 2001, pp. 221–228), etc. are important for understanding social and political realities, activities of cultural and educational institutions included in the second and third volumes of the collection.

Memoir literature remains the most informative materials for studying the functioning of the Przemyśl Gymnasium during the period under analysis (Stakhiv, 1995), in particular the authorship of Stepan Shakh (Shakh, 1977), “Reports”, i.e. the reports on the activities of the “Circle of Relatives” (Zvidomlennia, 1936a), or “Directorate of the Gymnasium” (Shakh, 1934), Memorable non-fiction books, essays (Zahajkevych, 1961 a). The materials of the Central State Historical Archive in Lviv also serve as a significant addition to the study of the activities of the Przemyśl Gymnasium: Fund 179 (Lviv School District Board of Trustees), Fund 206 (Native School Society), Fund 175 (State Examination Commission for Secondary School Teacher Candidates).

**The purpose of the article** is to analyse the activities of Stepan Shakh as the director of the Przemyśl State Gymnasium, to outline the main areas of the school administration under his chairmanship in the context of the challenges of the bureaucratic system and educational reform.

**The Results of the Research.** The Polish historian Tomasz Pudłocki noted that S. Shakh arrived in Przemyśl during a difficult period for the Ukrainian community, because the Polish administration did not sympathize with the development of the Ukrainian schooling (Pudłocki, 2011, p. 62). At the same time, the city’s Ukrainian population was divided by conflict with public associations after the attempts of the Przemyśl bishop Yosyf Kotsylovsky to introduce celibacy (Badiak, 2003 p. 242).

The management of the Gymnasium, represented by Stepan Shakh, resumed issuing reports on the activities of the educational institution (the last one dates back to 1917 – 1918). These reports are a valuable source for studying the history of the educational institution and the education system during the period under analysis. In the first renewed issue of the “Report of the Directorate of the State Gymnasium with the Ukrainian Language of Instruction in Przemyśl for the School Year 1933/34” a brief description of the previous graduates, a list of employees, including the administration, visitors (inspectors) from 1918/19 – 1932/33, and a statistical review “classifications and matriculation exams for the period under analysis” (Shakh, 1934, pp. 3–15). “School News of the Directorate of the Gymnasium for the School Year 1933/34” consisted of 14 sections, which provided an extended list of all employees of the gymnasium, changes among the personnel, orders of the school councils, which related to the activities of the educational institution, characteristics of property and real estate, the report of the school doctor, the list of educational activities, the content of school programmes and the plan of lectures, a short list of school collections and inventory of special classes, a detailed educational plan (with an outline of the activities of school organizations (including those supervised by parents and patrons of the gymnasium) and clubs)) (Shakh, 1934, pp. 22–79). The report for the academic year 1933/1934 also contains a list of names of high school students, statistical data on “matriculation exams”, “number of departments, number of students, their religion, nationality and age, rank and place of residence of relatives, annual classification” (Shakh, 1934, pp. 80–90).

The Gymnasium was located “in the state building at 21 Slovatskoho Street and in the branch building at 18 Slovatskoho Street, which is the property of Mrs. O. Litynska. The state building is large, two-storied, for school use, newly built, dated 1. IX. 1894” (Shakh, 1934, p. 24). This building was divided and the First Yu. Slovatsky State Gymnasium was located there as well. In June of 1932, owing to grants of the Ministry for Religion and Public Education and the Board of Trustees of the Lviv School District, a fence was built that separated the Gymnasium building from other buildings, and a botanical garden trees were also planted there (Shakh, 1934, p. 24).

Since 1932, the selection criteria for future students had expanded. Young people from remote districts of Poland were invited to study, and “senior students from all over Poland” were also accepted, including from the free city of Gdańsk (mostly sons of emigrants from the Dnieper region)” (Shakh, 1977, p. 51). This move to expand “geographical boundaries” proved its success in just a few years. In 1936, a problem arose with the placement of high school students from the Naddniprianshchyna. Bursy of “St. Father Nicholas” (“St. O. Nicholas”) and “Gymnasium Institute”, where they used to live, were overcrowded. Owing to the efforts of Petro Shkurat and Leonid Bachynsky, a new “Symon Petliura Bursa” was established. “Untrustworthy” students, those who were expelled from the Ukrainian or Polish gymnasiums in Poland due to politics entered the Gymnasium (Shakh, 1977, p. 51). There should be mentioned the memories of former graduates, in particular Yevhen Stakhiv, an underground member of the OUN, and later – the UPA. In his memoirs, the activist recalled that November 1, 1933 was a day off on the occasion of the Catholic All Saints’ Day, but the Polish administration cancelled it for the Ukrainian gymnasiums. Therefore, the gymnasium underground – the youth of the OUN decided to boycott classes, because on this day the heroes of 1918 and the creation of the ZUNR were honoured, instead it was decided that they should attend the church liturgy service (the annual hike to Mount Makivka was banned by the authorities after the trial on Bilas and Danylyshyn) (Stakhiv, 1995, p. 20). High school students were late for class and came without equipment, and were punished by the principal.

However, in 1934, Principal S. Shakh managed to settle “the provocation organized by the Polish authorities”: one of the students who cooperated with the authorities handed over a revolver before the police search, thereby compromising three Ukrainian high school students (Stakhiv, 1995, pp. 21–22).

Also, Stepan Shakh looked for talented young people personally, travelling in Lemky region every year during the holidays, staying at priests' houses he knew (Shakh, 1977, p. 51).

The new gymnasium director continued the work of his predecessors in supporting poor youth and founded the “Circle of Relatives” statutory society. A famous judge of the District Court, Volodymyr Sas-Podlusky (held the position from 1932 to 1939), was elected its chairman, Mykola Rybak, a lawyer and public figure, was appointed as a legal referent (Levandovska, 2015, p. 160). Its members were all parents and guardians of young people who studied at the Gymnasium (Fedevycheva, 1936, p. 5). “The main goal of the society was cooperation with the directorate of the Gymnasium and the Pedagogical Council, providing moral and material assistance to the youth of this institution” (Fedevycheva, 1936, p. 5). The society took care of the leisure time of high school students, organized events in honour of prominent figures or on the occasion of religious holidays, festivals, charity balls and evenings, concerts, excursions, sports competitions and walks, summer camps, etc. (Fedevycheva, 1936, pp. 6–23; Levandovska, 2015, p. 160).

Stepan Shakh, as noted by the Polish historian T. Pudłocki, managed to restore the public authority of the Gymnasium and its cooperation with the Church (Shakh, 1956, pp. 9–10; Pudłocki, 2011, p. 62). In 1933, he received permission from the authorities and held “St. Jehoshaphat's Day” on November 25. On this occasion, S. Shakh turned to prelate Ivan Kyshekevych to write a cantata, owing to joint efforts with Yevhen Hrytsak, it was possible to persuade Uliana Kravchenko to write a poem, and Olena Kravchenko to write a portrait (Pudłocki, 2011, p. 62).

The spiritual life of the high school youth was handled by the high school catechist, a guardian of the “Mariyska Druzhyna” in the educational institution, Father, Professor Petro Holynsky. Since 1933, the “Mariyska Druzhyna” organized concerts in honour of the patron Saint Yosyf. These events were attended by archeologists, among them was Bishop Yosyf Kotsylovsky and Bishop Hryhoriy Lakota (Shakh, 1977, p. 63).

The administration of the Gymnasium paid a lot of attention to the physical education of students and general development of the sports life of the Ukrainians of Przemyśl. “Sianova Chaika” (reformatted sports society) founded by the previous director Tsehlynsky “students sports club” came under the care of S. Shakh. A public figure Yaroslav Khorostil noted that only in the years before World War II, the second flowering of the society took place, in particular, during the period of leadership of the Przemyśl Gymnasium by S. Shakh (Khorostil, 1961, p. 356).

In 1934, S. Shakh organized the so-called “Olympic Games” to raise funds for the 25th anniversary of the founding of “Sianova Chaika”. The founder of “Sianova Chaika” Professor-emeritus Ivan Manuliak and its first chairman, doctor of medicine Andriy Kokodynsky, were elected as honorary presidents (Shakh, 1977, p. 65). In 1933, S. Shakh became the head of the “Sian League Sports Society”. In 1935, owing to the donations of the board of the society, members of the club and the public, the “Sian” society built a sports field in the suburb of Vovche (Khorostil, 1961, pp. 360–361).

From 1936, on this sports ground, “Sian” participated in competitions with other clubs for the championship in the “Lviv District League” (Khorostil, 1961, pp. 360–361), sports

holidays and football matches of students of Ukrainian schools in Przemyśl (Ukrainian state gymnasium, private gymnasium “Ukrainian Girls’ Institute”, students of the 7th-grade general school named after Shashkevych and the 6th-grade SS Sluzhebnytsi in Zasiannia) were also held there (Shakh, 1977, p. 66). In the gymnasium, there was the “Sports Club”, which organized sports football and volleyball competitions, including regional competitions (following the traditions of “Plast”, banned by the authorities) (Shakh, 1977, p. 66).

S. Shakh was an active skier, so he also gathered skiers from “Sianova Chaika”, organized walks with them in the vicinity of Przemyśl or to the highest mountain in the powiat, Kopystianka. Every year in February, he went with his students to the Carpathians for a week, usually in the vicinity of Turka or Lisko. On these trips, they were always accompanied by the school doctor (Dr. Myroslav Kunyk), Physical Education teacher Yevhen Bachynsky, or his assistant a contract teacher Mykhailo Romanets (Shakh, 1977, p. 66)

The organizational life of high school students was concentrated in the self-governing “Interclass Community of Students”, which included students who were elected by fellow representatives of “Class Communities” from all classes and the heads of self-education student groups (from 1933 – 1939 there were eight of them): “Mariyska Druzhyna” (led by Fr. P. Holynsky), “Lesia Ukrayinka Ukrainian Circle” (a chairman, Professor, Dr. Yevhen Hrytsak), “Historical and Geographical Circle” (supervised by Professor Volodymyr Solohub), “Musical Circle” with a choir and orchestra (led by the conductor of the choir – Professor Pavlo Voliansky, a conductor of the orchestra Leonid Khyliak), “Dramatic Circle” (chaired by Professor Bohdan Zahaikevych), “Natural and Geological Circle” (led by Professor Yuriy Dzhyhalo), “Classical Circle” (led by Professor Semen Kuzyk), “Sports Club “Sianova Chaika” (managed by Professor Yevhen Bachynsky). “Circle of Thrift” (supervised by Professor Stepan Malynovky) (Shakh, 1977, p. 67).

Owing to the support of parents and the director of the Przemyśl Gymnasium, the “Circle of Relatives” was founded, headed by Volodymyr Sas-Podluskyy (a public figure, judge of the District Court) and a legal officer Mykola Rybak (a lawyer). The main objective of the society was to provide a financial support to students. An important direction of the society’s work was the organization of summer camps, in particular in Tysovo near Przemyśl and Boryslavets near Dobromyl (Levandovska, 2015, p. 160).

Since 1933, owing to the funds of the “Circle of Relatives” society, the gymnasium began to publish a “report on their work and accounts” to inform the public about the results of their work. “Report” was published by the publishing house of the T. Shevchenko Scientific Society in Lviv, and distributed among students at the beginning of the school year, the rest – among the public (mostly former graduates), who bought copies and in this way the money for publishing was returned (Podluskyy, 1936, pp. 3–4). Notes and reviews in the Galician press of the time testify to a certain social significance of “Report”. In the “New Books and Magazines” section of the daily newspaper “Dilo” it is noted that “this is a valuable publication” with 25 articles and 38 illustrations, a brief overview of the main sections of the book is given (Zvidomlennia, 1936b). The magazine “Nova Zoria” published a similar assessment: “this edition is very diligent and instructive and interesting”. The authors of the monthly “Ukrainian Book” (published by the Bibliographical Commission of the National Academy of Sciences and the Ukrainian Society of Bibliophiles in Lviv) noted the quality of publishing, the content itself, and set “Report” as an example “for all other publishers of school report” (Hrytsak, 1937, pp. 16–17). The management of all the “circles” was carried

out by the “Interclass Community”, it was subordinate to the director, and it was headed by a student of the 7th grade, later a lyceum student of the 1st year of study (Shakh, 1977, p. 68).

A chief focus was on the cultural and educational process of the Przemyśl gymnasium students. Since its founding, there operated a choir (Shakh, 1977, p. 62), during the directorship of S. Shakh, its manager was the cultural and educational figure, a teacher Pavlo Voliansky (Romaniv, 2006). In 1935, the directorate of the Gymnasium together with the “Circle of Relatives” purchased a piano for the needs of the choir. The instrument playing lessons started. Music was taught by a concert pianist, a teacher of the branch of M. Lysenko Music Institute in Przemyśl – Volodymyr Bozheiko (Shakh, 1977, p. 62). An instrumental orchestra was also organized owing to the financial assistance of the “Circle of Relatives” and later – the orchestra of mandolin players (Shakh, 1977, p. 62).

In the 1930s, the association of Ukrainian school youth “Young Community” was founded within the walls of the Przemyśl Gymnasium (continuation of activity of Przemyśl branch of the “Ukrainian Students’ Union”, banned by the Polish administration in 1923). Its long-term leader was O. Hubytsky, the main goals of the society were the unification of the Ukrainian students (later the activity expanded to other school communities of the Ukrainians in Przemyśl), national and patriotic education, cultural and educational development of students, and material assistance to students (Levandovska, 2015, p. 160; CSHAUL, f. 596, d. 1, c. 1, pp. 1–17).

In the early 1930s, the reform of school education in Poland continued. In 1932, the law on the “System of Schooling” was issued. According to the document, the system of gymnasiums underwent significant changes. Instead of the four types of institutions that existed since the 1920s (mathematical and natural sciences, neo-humanistic, humanistic, classical), a 4-year high school of the humanitarian type with the study of Latin was introduced. According to the new educational law, secondary comprehensive school was a 6-year school: a 4-year gymnasium and a 2-year general education lyceum. The new curricula provided that lyceums could have specialization (departments): classical, humanitarian, natural, physical and mathematical. Graduates of folk 6-year schools who turned 12 could enter gymnasiums, and lyceums – at the age of 16 (Kotsiumbas, 2021, pp. 437–439). At the Przemyśl Gymnasium, on the advice of “Circle of Relatives” and “Mothers’ Committee”, the humanistic, mathematical and naturalistic profile of education was chosen (Shakh, 1977, p. 53).

In accordance with these innovations, curricula were also changed in general education schools (“comprehensive”), which “took over” “almost the entire curricula of the first and second gymnasium classes”. In a certain sense, “universal” schools became “preparatory” for new lyceums, so the latter had to establish contacts with them. The Ukrainian gymnasium in Przemyśl cooperated with “Vseliudna” (“comprehensive”) M. Shashkevych 7-grade school in Przemyśl, which was under the care of the “Native School” and with St. Nicholas 6-grade school of Sisters Nuns (near the Basilian Monastery in Zasiannia, in Przemyśl) (Shakh, 1977, p. 52).

Changing the structure and curriculum complicated the educational process and management. S. Shakh noted; “The Przemyśl Gymnasium consisted of three types of secondary schools during this period: 1) a classical 8-grade type (Latin from the 1st grade and Greek from the 3rd grade), 2) a humanistic type (no Greek, but Latin from the 4th grade) and 3) a new type (reformed since 1932 and growing every year) – 4 classes of the gymnasium and 2 classes of the lyceum. The directorate of the Przemyśl Gymnasium had to reduce all these three distinct types not only to one common didactic, but also to a common pedagogical denominator. S. Shakh, together with the Teachers’ Assembly, united these three types, which differ in their directions, into one harmonious whole” (Shakh, 1977, p. 59).

The educational reform brought changes to the curriculum and textbooks. New subjects were introduced, including “handicrafts classes”. In the Przemyśl Gymnasium, three workshops were opened in the school building (carpentry, metalwork and model making, book binding), which were managed by two specialist teachers (Josyp Pientka, Mavrzkiy Knobliavkh). Painting lessons were introduced under the leadership of Josef Wilko, Olena Kulchytska, Sofia Chekhovych in different years, including stained glass painting and icon painting. In 1937, “driving courses” with a qualified instructor were also established. Every year, after the end of studies, there were exhibitions of the works of high school students (Shakh, 1977, pp. 61–62).

The two-year study at the lyceum ended with the matura, after passing which the graduates had the right to study at “universities, polytechnics, business academies, commercial high schools, etc.” Under the leadership of the director, this first matriculation exam in both departments of the Lyceum of the Przemyśl Gymnasium was held in May of 1939. All 66 applicants passed the Matura, 10 with honours (Shakh, 1977, p. 61).

Since 1934, the Gymnasium held a two-year free teaching practice for young masters of philosophy, which, although it was additional burdensome work for the teaching staff, nevertheless testified to the high level of teaching, because the young specialists were sent to work by the direction of the School Board (Shakh, 1977, p. 56).

With the reform of school education in 1932, the end of the school year was moved to June 21, so the celebration of the patron of the gymnasium St. Cyril (“the learned Archbishop of Alexandria”) was left out of the celebration programme. The new director S. Shakh instead suggested that the gymnasium be under the patronage of St. Joseph (commemorated on November 25). The directorate’s idea was supported by catechist Petro Holynsky and the Pedagogical Council of the Teachers’ Assembly. After the blessing of the Episcopal Ordinariate of the Przemyśl Diocese Yosyf Kotszlovsky and the approval of the Lviv School Board of Trustees in 1933, the Gymnasium received a new patron, a service was held in the church and a religious national concert, which, in addition to parents, was attended by highly respected guests (Yo. Kotsylovsky, H. Lakota) (Shakh, 1977, p. 63)

In December of 1938, the Przemyśl Gymnasium celebrated its 50th anniversary (Archiwum Państwowe w Przemyślu, zespól 56/397, sygn. 3987, p. 1). On this occasion, the “Junior Committee” was founded, which organized the holiday and published the Almanac “Commemorative Book” “Where the Silver Sian Floats”. Preparations for the Jubilee began as early as 1937. In October of 1937, the general meeting of the Association of Secondary School Teachers “Uchytelska Hromada” in Przemyśl decided to gather former graduates for the celebration. The “Honorary Jubilee Committee” (V. Pynyla, I. Bryk, I. Zvlynsky, R. Hamchykevych) and the “Business Jubilee Committee” (S. Bobyliak, I. Boryla, O. Kolodiy, etc.) were formed (De sribnoletyj Sian plyve, 1938, p. 223).

It is worth noting that a significant part of the memoirs about the Przemyśl Gymnasium mainly covers the establishment of this educational institution, the history of the activities of individual figures, and its influence on the development of the national and cultural life of the Ukrainian population of Przemyśl. As for the activities of the Gymnasium in the 1930s, a number of positive changes under the leadership of S. Shakh are mostly outlined. Instead, there are practically no critical remarks or characteristics. It is quite possible that extensive characteristics of S. Shakh as the director of the Przemyśl Gymnasium were not given for ethical or other subjective reasons, in particular, the memoirs published in emigration circles in the 1950s and 1960s.

Bohdan Zahaikevych, a public figure, was one of those who cautiously noted that S. Shakh’s activities in Przemyśl were condemned by a part of the Ukrainians. “Director

S. Shakh's activities did not find recognition among the part of the Przemyśl residents who accused him of favouring the Poles too much, that the Gymnasium, in particular, too often took part in the Polish state events, etc. But at the time, circumstances simply forced a director to do that way. S. Shakh had to give in to the Polish occupation authorities if he wanted to save the very existence of the Gymnasium, which was the salt in the eyes of the Poles, as the westernmost stronghold of the Ukrainian spirit. At the same time, he often burdened the teachers' union and the student community, taking on his shoulders numerous troubles associated with such a policy (Zahajkevych, 1961b, p. 277).

In 1939, with the beginning of World War II and the first Soviet occupation, the Ukrainian Przemyśl Gymnasium ceased to exist. Gradual Sovietization of the region took place, particularly in the educational sphere (Haliv & Drobchak, 2017, p. 146). Two departments of the Gymnasium were transformed into a Soviet 10-year school that operated during the years of 1939/40 school year. At first, the Red Army lieutenant Hlukhenky (a former director of the school in Podilla) was appointed as its leader, and soon after – a teacher Teklia (Olena) Neborak (a wife of a major). Mykhailo Demchuk, a former Professor at the Przemyśl Gymnasium, was appointed as a visitor. The demarcation line passed through Przemyśl, so Zasiannia (the left bank of the city and the region) was cut off from the Gymnasium, which is why the number of students decreased there significantly. At the end of the 1939/40 school year, the position of school director was taken by a teacher Melnyk from Podillia. The Shashkevych 7-grade general school (it was located in the neighbouring building of the "Native School"). The combined institutions became Joseph Stalin 10-year Soviet school (Shakh, 1977, pp. 83–84).

**The Conclusions.** As the director of the Przemyśl Gymnasium, Stepan Shakh continued the work of his predecessors, supporting the activity of the educational institution at a high level, directing his efforts to the organization of educational process, while at the same time focusing on educational work.

One of the first important steps of the new head was to establish the educational process, combining the curriculum according to the old models (the 8-class classical and humanistic system of gymnasiums) and the new ones introduced in 1932. The 6-class general education programme (4-class gymnasiums and 2-class lyceum), choosing a humanistic, mathematical and naturalistic profile of education according to a new approach. From the bureaucratic point of view, the systematization of the history of the gymnasium's activities was also an important step, in particular S. Shakh organized the release of reports on the activities of the educational institution.

The leadership of the Gymnasium closely cooperated with the chartered society "Circle of Relatives", "Mariyska Druzhyna", "Interclass Community" in the issue of national patriotic education of youth, sports development of students.

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**THE UKRAINIAN QUESTION IN THE FOREIGN POLICY  
OF THE SECOND POLISH REPUBLIC AT THE TURN OF 1938 – 1939**

**Abstract.** *The purpose of the proposed article is to elucidate the role and place of the Ukrainian issue in the foreign policy of the Second Polish Republic at the turn of 1938 – 1939, in particular its relations with Germany, the USSR, and Romania. The study of Poland’s foreign policy in 1938 – 1939 is central to understanding the dynamics of international processes in East-Central Europe on the eve of World War II. After all, the fate of peace on the continent ultimately hinged upon Warsaw’s relations with Berlin, Moscow, London, and Paris. The background of these relations was the Ukrainian issue, which entered a new stage of its internationalization in the wake of the “Czechoslovak crisis” and the emergence of Carpatho-Ukraine as a factor in international politics. The formation of Ukrainian autonomy south of the Carpathians in October of 1938 exposed the Ukrainian issue on a global scale as the largest unresolved national issue in interwar Europe. In 1938 – 1939, Subcarpathian Rus’/Carpatho-Ukraine turned into a geopolitical frontier, a zone of conflict of interests of key European players (Germany, Hungary, Poland, Romania, the USSR, Great Britain, France, Italy). The research methodology is based on the approach of “histoire croisée”, “entangled history” and “connected history”, as subspecies of global history. This approach, in our opinion, serves as an effective means of integrating the Ukrainian history into a global historical context, giving the national metanarrative features of inclusiveness. The scientific novelty consists in the fact that the author tried, based on a wide range of published and unpublished archival documents, to comprehensively reveal the role of the Ukrainian issue in the foreign policy of the Second Polish Republic against the background of international relations during the turning point in the history of interwar Europe. The Conclusions. It has been established that the post-Munich period of international relations was marked by the actualization of the Ukrainian issue in European politics, the impetus for which gave the formation of Carpathian Ukraine as an autonomous unit within the Second Czecho-Slovak Republic. At the turn of 1938 – 1939, the Ukrainian issue became a central topic on the agenda of the Polish diplomacy, which was an important factor in its relations with Germany, the USSR, Romania, and Czecho-Slovakia. The balance of power in the east of the continent, the state of relations between them, and ultimately the fate of peace and war in Europe depended largely on the attitude of the key subjects of international relations to the Ukrainian issue. The period of 1938 – 1939 was marked by the active rapprochement of Poland and Germany against the background of the dismemberment of Czecho-Slovakia and Berlin’s determined efforts to draw Warsaw into its orbit of influence in order to*

form a military and political alliance against the USSR. In the bilateral German-Polish negotiations, the Ukrainian issue appeared as a certain “bait” and “bargaining chip” that the Nazis actively traded, hoping to attract Poland to their side to realize their long-term goals in the East. Despite the existence of a pro-German wing among the Polish ruling camp, which advocated cooperation with the Third Reich in solving the Ukrainian issue and a joint campaign against the USSR in the spirit of the concept of Prometheism, the Polish diplomacy led by Józef Beck at the beginning of 1939 rejected German demands and gradually took a course towards resumption of cooperation with Western democracies – Great Britain and France. At the same time, at least until the end of March 1939, there was still room for the German-Polish negotiations, in which the Ukrainian issue ceased to play a leading role.

**Key words:** Carpatho-Ukraine, Ukrainian issue, Second Polish Republic, international relations, Munich conference.

## УКРАЇНСЬКЕ ПИТАННЯ У ЗОВНІШНІЙ ПОЛІТИЦІ ДРУГОЇ РЕЧІ ПОСПОЛИТОЇ НА ЗЛАМІ 1938 – 1939 рр.

**Анотація. Мета статті** – розкрити роль і місце українського питання у зовнішній політиці Другої Речі Посполитої на межі 1938 – 1939 рр., зокрема її відносин з Німеччиною, СРСР та Румунією. Дослідження зовнішньої політики Польщі на переломі 1938 – 1939 рр. є центральним для розуміння динаміки міжнародних процесів у Центрально-Східній Європі напередодні Другої світової війни, адже від відносин Варшави з Берліном, Москвою, Лондоном і Парижем, зрештою, залежала доля миру на континенті. Загальним тлом цих відносин було українське питання, яке увійшло в новий етап інтернаціоналізації у зв'язку із “чехословацькою кризою” та появою Карпатської України як фактора міжнародної політики. Формування у жовтні 1938 р. української автономії на південь від Карпат оголило у глобальному масштабі українське питання як найбільше нерозв'язане національне питання у міжвоєнній Європі. У 1938 – 1939 рр. Підкарпатська Русь / Карпатська Україна перетворилася на геополітичний фронтір, зону зіткнення інтересів ключових європейських гравців (Німеччини, Угорщини, Польщі, Румунії, СРСР, Великої Британії, Франції, Італії). **Методологія дослідження** базується на підході “перехресної історії” (histoire croisée), “заплутаної історії” (entangled history) та “зв'язаної історії” (connected history) як підвидів глобальної історії. Саме такий підхід, на нашу думку, слугує ефективним засобом інтеграції української історії у світовий історичний контекст, надаючи національному метанаративу рис інклюзивності. **Наукова новизна** полягає у тому, що автор спробував на основі широкого спектру опублікованих і неопублікованих архівних документів, комплексно розкрити роль українського питання у зовнішній політиці Другої Речі Посполитої на широкому тлі міжнародних відносин у переломний період історії міжвоєнної Європи. **Висновки.** Встановлено, що постмюнхенський період міжнародних відносин був позначений актуалізацією українського питання у європейській політиці, поштовхом до чого стало створення Карпатської України як автономної одиниці у складі Другої Чехо-Словацької республіки. На зламі 1938 – 1939 рр. українське питання стало центральною темою на порядку денному дипломатії Польщі, яке виступало важливим фактором її відносин з Німеччиною, СРСР, Румунією та ЧСР. Значною мірою від ставлення ключових суб'єктів міжнародних відносин до українського питання залежав баланс сил на сході континенту, стан відносин між ними, а у підсумку – доля миру та війни у Європі. 1938 – 1939 рр. були позначені активним зближенням Польщі та Німеччини на фоні розчленування Чехо-Словащини та рішучими зусиллями Берліна втягнути Варшаву у свою орбіту впливу для формування воєнно-політичного союзу проти СРСР. У двосторонніх німецько-польських переговорах українське питання виступало як певна “приманка” та “розмінна монета”, якою нацисти активно торгували, сподіваючись залучити на свій бік Польщу для реалізації своїх довгострокових цілей на сході. Попри наявність серед польського правлячого табору пронімецького крила, яке виступало за співпрацю з Третім Рейхом у розв'язанні українського питання та спільному поході проти СРСР в дусі концепції прометеїзму, польська дипломатія на чолі з Юзефом Беком на початку 1939 р. відкинула німецькі вимоги та поступово взяла курс на відновлення співпраці із західними демократіями – Великою Британією і Францією. При тому, ще принаймні до кінця березня 1939 р. залишався простір для німецько-польських переговорів, в яких українське питання перестало відігравати провідну роль.

**Ключові слова:** Карпатська Україна, українське питання, Друга Річ Посполита, міжнародні відносини, Мюнхенська конференція.

**The Problem Statement.** Historians distinguish several stages in which a global interest in Ukrainian affairs was shaped in the first half of the 20th century (Ziba, 2010, p. 107). One of them falls on the turbulent times of geopolitical changes in East Central Europe on the eve of World War II when the autonomous entity of Podkarpatska Rus' (Carpatho-Ukraine) was proclaimed within the Second Czecho-Slovak Republic, which was considered in Ukrainian political circles as the first stage before the formation of an independent united Ukraine. In the period following the Munich Conference (29–30 September 1938), after a long break from the Ukrainian Revolution and the Liberation Struggle of 1917 – 1921, the Ukrainian issue again surfaced on the international agenda and was actively discussed in connection with the project of “Greater Ukraine”.

As the most unresolved national issue in Europe, the Ukrainian issue directly affected the interests of four countries at once, which in the wake of WWI held the Ukrainian lands, namely the USSR, Poland, Czechoslovakia, and Romania. For the Second Polish Republic (PR), which during Józef Piłsudski's 'sanation regime' was considered one of the main “depositories” of the Ukrainian issue in interwar Europe, the emergence of Carpatho-Ukraine as an autonomous entity and later, for a short period, as an independent state, created a significant challenge to its foreign and domestic policies. Polish contemporaries compared this challenge to the “mining” of the borders of the Second PR (Pilarski, 2008, p. 162).

The study of Poland's foreign policy at the turn of 1938 – 1939 is central to understanding the dynamics of international processes in East-Central Europe on the eve of WWII. After all, the fate of peace on the continent hinged upon Warsaw's relations with Berlin, Moscow, London, and Paris. The background of these relations was the Ukrainian issue, which entered a new stage of its internationalization in the wake of the “Czechoslovak crisis” and the emergence of Carpatho-Ukraine as a factor in international politics.

**The Review of Recent Publications and Researches.** The history of Poland's foreign policy of the interwar period is regarded perhaps as one of the best-developed problems in Polish historiography. The European crisis of 1938 was the subject of many studies and publications in both Polish and Western history writing (Batowski, 1962; Batowski, 1973; Stanisławska, 1962; Polska a Monachium, 1967; Cienciała, 1999, pp. 48–81; Kornat, 2007; Batowski, 2008; Kornat, 2012; Żerko, 2020; Kornat, Wołos, 2021). Nevertheless, some of the key aspects remain on the periphery of scientific research. This especially concerns Poland's policy towards Carpatho-Ukraine and the broader Ukrainian issue in 1938 – 1939. While analysing this aspect of the Second PR's policy, the Polish historian Jan Pisuliński drew attention to the lack of sources and dominance of numerous hypotheses as the main obstacles to a comprehensive study of the problem (Pisuliński, 2008, p. 115).

Although Polish historiography can boast of several fundamental monographs devoted to Poland's policy towards Transcarpathia in 1938 – 1939 (Dąbrowski, 2007; Jarnecki, Kołakowski, 2017), their authors, however, failed to present the problem in a larger international context and connect it with the Ukrainian issue.

One of the first historians who drew attention to the special role of the Ukrainian issue in international politics in general and Poland's foreign policy in 1938 – 1939, in particular, was the Canadian Slavist and a researcher of the Polish-Ukrainian relations Bohdan Budurovych. While analysing the limited scope of sources available to him at the time, the author concluded that the liquidation of Carpatho-Ukraine was the Second Polish Republic's most important foreign policy task between the annexation of Cieszyn Silesia at the beginning of October of 1938 to the establishment of the Polish-Hungarian border in mid-March of 1939 (Budurovych, 1958, p. 61).

In modern Ukrainian historiography, several attempts have been made to highlight the role of the Ukrainian issue in the Polish-Soviet relations and the broad context of international relations in 1938 – 1939 (Zlepko, 1994, pp. 249–308; Sviderska, 2001a; Sviderska, 2001b; Hetmanchuk, 2008; Hetmanchuk, 2003, pp. 46–55; Shkandrij, 2015, pp. 121–136; Hai-Nyzhnyk, 2018, pp. 48–56; Trofymovych & Trofymovych, 2013; Trofymovych & Trofymovych, 2018, pp. 309–328; Trofymovych & Trofymovych, 2019, pp. 251–270; Vidnianskyi, 2019, pp. 67–93; Vidnianskyi, Hrytsiuk & Lysenko, 2019, pp. 4–24).

**The Purpose of the Research.** Based on a large scope of diplomatic documents, diaries, and memoirs of diplomats, to elucidate the role and place of the Ukrainian issue in the foreign policy of the Second Polish Republic at the turn of 1938 – 1939, in particular, its relations with Germany, the USSR and Romania. The sources of our research comprise both unknown and already published documents from the Archives of New Acts in Warsaw, which primarily originate from the collections of the Ministry of Foreign Affairs of Poland and its diplomatic representations abroad.

**The Results of the Research.** During the period following the Munich Conference (29–30 September 1938), the idea of creating a common border between Poland and Hungary on the territory of Subcarpathian Rus' (Transcarpathia) became the central element of Poland's foreign policy strategy on the Czechoslovak track. For Warsaw, it was more important than the annexation of Cieszyn Silesia, the solution to the Slovak issue, or minor territorial corrections on the Polish-Czechoslovak frontier. A common border with Hungary was designed to open a gateway for Poland to the Danube basin and the Balkans. Without it, a full-fledged union between Poland and Hungary could not be materialized, as well as the ambitious project of the Minister for Foreign Affairs of Poland Józef Bek – the “Third Europe” or “Intermarium”. It was also about cutting the so-called “Czech corridor”, through which the Soviet Union, as the Poles feared, could have established a common frontier with the Czechoslovak Republic by separating Eastern Galicia from the RP.

However, the emergence of Carpatho-Ukraine, which was considered in many European capitals as the “Ukrainian Piedmont”, “a springboard to Ukraine” and “a starting point for igniting the Ukrainian movement”, became an obstacle to the realization of Poland's foreign policy aims in the region following the Munich Conference (DBFP, 1950, p. 201). In Warsaw, the existence of Carpatho-Ukraine was foremost seen as an existential threat that challenged the Polish status quo in Eastern Galicia and Volhynia. At the turn of 1938 – 1939, the conflict between two geopolitical projects – the “Third Europe” and “Greater Ukraine” entered its acute phase.

The declaration of Carpatho-Ukraine's autonomy on 11 October of 1938 took place at the time when Western diplomacy and the wider public were considering Hitler's immediate plans and were preoccupied with the protection of Western European countries from possible Nazi aggression. Despite Germany's reticence on the issue of Carpatho-Ukraine and its future (the Führer never expressed his official position regarding the fate of the region, vailing it under the general declaration about the realization of the Czecho-Slovakia peoples' rights to self-determination), Western politicians and diplomats were convinced that the German propaganda was completely directed towards the Ukrainian nationalism. Britain and France believed that Germany would seek to conquer Ukraine, hence the autonomy in Transcarpathia was considered the German idea, the first stage towards the subjugation of the Soviet Union. While facing a strong threat from Berlin, the Western governments expected that Hitler's “Ukrainian card” would serve as a means of directing German expansion to the east (Pahiria, 2017, p. 113–135).

Starting from the end of October 1938, the Ukrainian issue firmly established itself on the agenda of the Polish-German relations and was linked with Hitler's attempts to involve Poland in his coalition in the upcoming war in Europe. During this period, the Führer left open the question of where he would make his first strategic strike – in the west or the east. The direction and time of his next move to a greater extent depended on Poland's position. According to the Polish historian Krzysztof Rak, the latter played the role of a geostrategic cornerstone that influenced the overall balance of power on the continent. On the one hand, whether Warsaw sided with Paris and London or Berlin influenced whose sphere of influence Central Europe would be – those of the Western countries or Germany. The combined military potential of Great Britain, France, and Poland did not give Germany a chance to win a two-front war. However, infected with the “appeasement virus”, Britain and France refrained from triggering their alliances with Poland against the Third Reich. On the other hand, the Second Polish Republic stood in the way of Hitler's eastern “crusade” aimed at the Ukrainian lands, while the combined military potential of the two states significantly increased the chances for success in a potential military campaign against the USSR. Therefore, turning Poland into a satellite ally was the most optimal way for the Führer to implement his long-term military and political plans to subjugate the Soviet Union and to create a “living space” (Lebensraum) in the east. In addition, Poland was supposed to provide Germany with a reliable rear from the east in the event of an outbreak of hostilities in the west and to help it avoid a two-front war (Rak, 2019, pp. 416–417, 478–479). In 1938, it might have seemed that Poland had no choice but to accept the German offer.

For the first time, Germany used the issue of Carpatho-Ukraine as a “bargaining chip” in its strategic negotiations with Warsaw on the “general cleansing” (gesamtlösung) of the German-Polish relations during the meeting between the Polish ambassador Józef Lipski and the Reich's Foreign Minister Joachim von Ribbentrop on October 24, 1938 in Berchtesgaden. Then, the German side offered, in exchange for the transfer of Gdańsk (Danzig) to the Reich and permission to build an extraterritorial highway and railway through Pomerania to connect Germany with East Prussia, to positively resolve the issue of Carpatho-Ukraine in the interests of Poland (PDD, 2007, p. 730). If the Poles had direct territorial claims to the region, the Nazis were prepared to satisfy them in exchange for the Polish government's consent to resolve the Gdańsk and extraterritorial highway issues by German wishes. While observing Poland's excessive interest in the problem of Subcarpathian Rus' and the common border, Berlin decided to use this factor in blackmailing Poland and inclining it to accept the German proposals.

After the First Vienna Award on November 2, 1938 (which resulted in the transfer of south-western territories of Transcarpathia mostly inhabited by the Hungarians to Hungary, whereas Germany and Italy guaranteed the borders of autonomous Carpatho-Ukraine), the Ukrainian factor became decisive in Poland's foreign policy in East-Central Europe. Reports about the involvement of the Nazi officials in promoting the Ukrainian cause provoked great concern in Warsaw (PDD, 2007, p. 775). Suspicions were additionally reinforced by reports of the Polish consular representations from Germany, particularly Vienna, which spoke of German-Ukrainian cooperation towards the realization of “Greater Ukraine” project (AAN, Ambasada RP w Berlinie 474, sygn. 385, p. 140).

In November – December of 1938, Polish diplomatic missions abroad observed the actualization of the Carpatho-Ukraine problem in the Western press and public opinion and rapid internationalization of the Ukrainian issue in European politics. Reports on this

topic came both from the capitals of leading European states and from centres having less weight in international politics (AAN, Ambasada RP w Berlinie 474, sygn. 385, pp. 119–121, 127–131). Polish diplomats monitored threats to Poland's international security and tried to intervene whenever possible. Against the background of the country's enormous diplomatic efforts to achieve a common border with Hungary, combined with a propaganda campaign and sabotage actions in Subcarpathian Rus', Warsaw tried in every possible way to counteract the spread of the viral Ukrainian campaign in the European press and to guide it in a direction beneficial to itself.

Concerns about the use of the "Carpatho-Ukrainian card" by the Germans forced the Deputy Director of the Political and Economic Department and at the same time the chief of the Eastern Division of Poland's MFA Tadeusz Kobylański to take an unusual step. On November 17, 1938, he visited the first secretary of Germany's Embassy in Warsaw, Rudolph von Scheliga, to openly appeal to the Germans in the Carpatho-Ukrainian case, which, in his opinion, greatly overburdened the German-Polish relations. Historians know several versions of the recording of this conversation. According to the German report sent to Berlin, Kobylański warned that if the Nazis intended to use Carpatho-Ukraine as a springboard to resolve the Ukrainian issue, then Poland would end up in the camp of Germany's enemies. The Deputy Director of the Political and Economic Department stated that Poland would use all available means to establish a common frontier with Hungary and thereby prevent the loss of Ukrainian lands in Poland. Instead, Kobylański presented the Polish idea: Warsaw was aware of Berlin's plans to acquire a sphere of influence on the Soviet territory and, in this regard, was ready to cooperate with the Germans in solving the Ukrainian issue "without reducing its territory" and to reach an agreement with the Nazis ensuring their interests in access to Soviet Ukraine (Żerko, 1998, pp. 139–140).

The most sensational description of the Kobylański-Scheliga conversation is contained in a so-called short version, which, according to the German diplomat, was documented by the Soviet agent in Warsaw. According to this report stored in Russian archives, Kobylański had to say the following: "The issue of Subcarpathian Rus' is of a decisive importance to us. You see the anxiety this issue causes in our Ukrainian regions. We suppress and will suppress this unrest. Don't make it impossible for us to carry out our policy. If Subcarpathian Rus' joined Hungary, then Poland would later agree to side with Germany in the campaign against Soviet Ukraine. If Subcarpathian Rus' remains a centre of unrest, you will make a joint march impossible for us" (God krizisa, 1990, p. 105).

While analysing various versions of the recordings of the mentioned conversation, the Polish historian Stanislaw Żerko concludes that all of them confirm the transfer of the Polish proposals to the German side, which effectively amounted to the signaling of Poland's readiness to take joint participation alongside Germany in a military campaign against the USSR, once Berlin found a positive resolution of the issue of a common border between Poland and Hungary. At the same time, the scholar believes that the chief of the Eastern Division acted on his initiative without instructions from the Minister of Foreign Affairs, and in a very frivolous way tried to persuade the Germans to resolve the issue of Carpatho-Ukraine (Żerko, 2020, p. 147).

This allows to suggest the existence of a pro-German group within the Polish MFA led by the head of its Eastern Division Kobylański, which advocated Poland's participation in a joint campaign with Germany against the USSR and cooperation with the Nazis in the resolution of the Ukrainian issue based on Warsaw's military and political aims. This assumption is



corroborated by assessments of some contemporary diplomats (Hory, 2017, p. 335; Stosunki polsko-czechosłowackie, 2006, pp. 145–146). For instance, according to the observation made by the American ambassador to Warsaw, Drexel Biddle, there was a long-standing camp within Polish government circles that counted on Poland's cooperation with Germany in the creation of an independent Ukrainian state in exchange for "proportionate remuneration" for "services rendered" in the form of territorial possessions. Minister Beck, according to this information, had a rather sober view of the situation and cherished no illusions about the potential benefits of cooperation with the Nazis in the east (Poland, 1976, pp. 267, 270, 273).

The failure of Hungary's plans for the occupation of Carpatho-Ukraine on November 20–21, 1938 marked the defeat of Beck's foreign policy, who was firmly convinced that implementation of the common border policy would not meet serious international resistance, especially from Germany. Poland's great power ambitions were put into doubt, as well as its international prestige. After the German-Italian demarche on November 21, 1938 against Budapest's plans to conduct a military operation to occupy the region, Poland together with Hungary was isolated in the international arena. Against the background of rumours concerning the German plans to utilize Carpatho-Ukraine as a springboard for a campaign in the east, the Poles felt surrounded and deceived. According to testimonies of foreign diplomats, the Polish government circles experienced a real shock as the consequence of the unexpected change in Germany's policy on the Carpatho-Ukrainian issue (Hory, 2017, p. 292; DIMK, 1970, p. 417). It seemed that the ambitious "Third Europe" project suffered a serious blow.

According to Minister Beck, the position taken by the German Foreign Ministry on the common frontier and Carpatho-Ukraine had driven the German-Polish relations to a dead end. He was convinced that after the Munich crisis, which became the apogee of the German-Polish cooperation against the background of the dismemberment of the Czechoslovak Republic, the events surrounding Subcarpathian Rus' called into question the political line defined by the treaty of January 26, 1934. The host of Brühl Palace (the building that in the 1930s housed the Ministry for Foreign Affairs of Poland) sought to find out a true attitude of the Nazi leadership towards Carpatho-Ukraine and the Ukrainian problem in general and remove them from the agenda of the Polish-German negotiations (DTJS, 1972, pp. 376–377).

After the failure of the Hungarian tactics of *fait accompli*, the issue of the common border completely shifted to the realm of German-Polish relations. Warsaw was wary of directly addressing Berlin with a request to lift its veto on resolving the Carpatho-Ukrainian problem while fearing that the Nazis would immediately present a bill on the Gdańsk track. The most optimal tactic for Poland was to wait and counteract the consolidation of the Ukrainian movement in the region by strengthening control over its southern border with the view to prevent the penetration of the Ukrainians from Poland into Carpatho-Ukraine.

To secure its "diplomatic rear", Poland took steps to normalize relations with the Soviet Union. On November 26, 1938, the two countries signed a joint communiqué, which became an international sensation, giving rise to numerous speculations in the international press about the Ukrainian leitmotif of this move. The Polish leadership primarily sought to balance its relations with its eastern neighbour that experienced a serious escalation during the September 1938 crisis (including a demonstration of military force on the border, the penetration of the Soviet aircraft into Polish airspace, and border incidents) – the largest since the signing of the Riga Peace Treaty of 1921. The 26 November Polish-Soviet declaration aimed to restore the political status quo in bilateral relations based on the bilateral non-aggression pact concluded in July of 1932 (PDD, 2007, p. 794).

However, many external observers read explicit anti-German motives into the Polish-Soviet communique (Hory, 2017, p. 56). The Soviet press deliberately inflamed the anti-German slant of the 26 November declaration while trying to drive a wedge between Poland and Germany. Although the Germans tried to hide their negative reaction to the signing of the Polish-Soviet communique and publicly downplayed its significance, they still believed that it was Beck's response to the Germans blocking the establishment of a joint Polish-Hungarian border and playing the "Ukrainian card" (Konrat & Wołos, 2021, p. 613).

The Polish diplomats knew that Germany's geostrategic goal was to establish control over the mineral and food resources of Soviet Ukraine. German interest in the latter was part of a larger colonial problem and the Lebensraum policy in the east (Poland, 1976, pp. 20–21). The Poles realized that the Nazis did not have crystallized views on the solution of the Ukrainian issue and the broader problem of transforming the Soviet space. Germany's engagement in Subcarpathia was therefore viewed by them as an attempt to create a base for a propaganda campaign aimed primarily at the sub-Soviet Ukrainian territories, rather than at the Ukrainian lands within Poland (DTJS, 1972, pp. 388, 458).

In connection with the international actualization of the Ukrainian issue at the end of 1938, the Polish government began developing its vision for solving the Ukrainian problem both within the country and in the context of the expected collapse of the Soviet Union. On December 11, 1938, the Director of the Political Department, and the chief of the Western Division of the Polish MFA, Józef Potocki, informed State Secretary Jan Szembek about the pressure exerted on the government in Warsaw regarding the shaping of Polish domestic policies on the Ukrainian track, in particular, regarding the autonomy of Eastern Galicia. At the same time, with the prospect of the USSR's disintegration looming on the horizon, different corners of the Polish ruling elite discussed the idea of a possible expansion of the Polish borders to the east, including the capture of Kamianets-Podilskyi and Zhytomyr, which was supposed to signal the restoration of the 1772 historical borders of the First Polish-Lithuanian Commonwealth (DTJS, 1972, p. 381).

In the context of international discussions about the possible collapse of the Soviet Union and the resolution of the Ukrainian issue, cooperation with Romania became especially important for the Polish government. As early as on November 1, 1938, the Deputy Director of the Political and Economic Department of the Polish MFA, Kobylański presented in detail to the Romanian Ambassador Richard Franasovici ideas related to the solution of the Russian and Ukrainian problems from the perspective of common interests of Poland, Romania, and Hungary. In response, on November 8, 1938, the Romanian ambassador emphasized that Poland and Romania should start a detailed study of the Ukrainian issue, given the disintegration process affecting the Soviet state and the actualization of the Ukraine problem (DTJS, 1972, pp. 337, 347). The Romanians were also not against joining the German-Polish company in deciding the fate of Ukraine, so as not to suddenly become a victim of the so-called Nazi plans to create "Greater Ukraine". Bucharest believed that London and Paris would support the direction of the German aggression against the USSR while taking a neutral position in this case (Poland, 1976, p. 269).

By exploiting the Romanian government's fears of the Ukrainian problem Poland eventually managed to change the position of its ally on the issue of the common border. This took place in mid-December of 1938, after the arrival of Grigore Gafencu, a strong supporter of cooperation with Poland, as Romania's Foreign Minister. The first meeting of Polish Ambassador Roger Raczyński with the newly appointed minister on December 27, 1938,

saw new approaches in Bucharest. During the conversation, Gafencu expressed interest in Minister Bek's views on the entire complex of the Ukrainian problem and offered to strengthen bilateral cooperation in studying this issue for policy development. The Romanians sought to obtain as much information as possible from the Poles to assess the likelihood of the German intentions in the East (PDD, 2007, p. 858).

On December 14, 1938, during a meeting of Poland's highest government circles with President Ignacy Mościcki at the Warsaw Castle, Minister Beck was given a task to find out the Nazi goals in Eastern Europe in general and about Poland in particular (Poland, 1976, p. 268). Trying to bring clarity to the German-Polish relations, particularly in the light of Ribbentrop's proposals for "general cleansing" as of October 24, 1938 and the international situation surrounding Carpatho-Ukraine, Minister Beck sought a personal meeting with Hitler. He did not trust the Reich's Foreign Minister and assumed that his policies did not align with the Führer's vision. The top Polish diplomat wanted to test the limits of Hitler's flexibility in the Gdańsk issue, to probe his further intentions in Eastern Europe, and to obtain assurances that the resolution of the Ukrainian issue would not contravene Poland's interests (Poland, 1976, p. 298).

Beck's meeting with Hitler took place on 5 January 1939, at the Berghof residence in the Bavarian Alps, in the presence of Minister Ribbentrop, Ambassadors Lipsky and Moltke, and his chief of staff Michał Łubieński. Two key issues surfaced prominently on the agenda of the Polish side: the dismemberment of Czecho-Slovakia and the problem of Gdańsk (DTJS, 1972, p. 463). Additionally, the Germans also sought to exchange views on the USSR and the Ukrainian issue. At the beginning of the negotiations, Führer highlighted the consistency of his policy of maintaining good-neighbourly relations with Poland based on the non-aggression pact of January 26, 1934 and pointed at the common interest of the two states about Russia (USSR) (PDD, 2005, p. 14). Then, upon his initiative, the German Chancellor turned to the Ukrainian problem and declared that he was interested in Ukraine only from an economic point of view, not a political one and that he would not have gone against Poland in this matter in any case. According to Führer, solving the problem of Ukraine was a matter of a distant perspective, as part of the wider Soviet question. Instead, the issue of colonies was on the agenda, not Ukraine, and Poland, he assured, had nothing to fear about this (DBFP, 1953, p. 153; DTJS, 1972, p. 465; Poland, 1976, pp. 302–303).

Even though Germany was allegedly not interested in Ukraine's issue, it intended to continue closely monitoring its development. According to Lipsky, the Führer was generally not against the separation of the Ukrainian SSR from the USSR as a means of weakening and finally disintegrating the Soviet empire. Beck agreed with this argument, stressing Poland's special interests in the east, while also stressing the importance of maintaining the integrity of the territories inhabited by the Ukrainians as part of the Polish Republic (DIMK, 1970, p. 346).

Hitler devoted much of the time to dispelling Beck's suspicions about the Reich's policy in Carpatho-Ukraine, which cast a shadow on the Polish-German friendship. According to Führer, he rejected the scenario of the Hungarian occupation of the region as it threatened to trigger an armed conflict in Central Europe (DTJS, 1972, p. 464; DBFP, 1953, pp. 154–155). In response, Beck said that if Carpatho-Ukraine turned into "a hotbed of unrest and agitation" against Poland, then Warsaw "would crush it with all ruthlessness". The Führer took note of this statement, thereby making it clear that Germany would not resist Polish plans of aggression against Subcarpathian Rus' (PDD, 2005, pp. 31–32). On this occasion, Beck presented his vision of the Ukrainian issue to the Führer. According to him, the population of

Carpatho-Ukraine had nothing in common with the population of “real Ukraine” located on both banks of the Dnipro River (DBFP, 1953, p. 158).

According to Michał Łubieński, one of the participants of the meeting in Berchtesgaden, Hitler presented a plan of Polish expansion towards Ukraine, which he was ready to recognize as a sphere of Poland's exclusive interests. This also included the issue of Carpatho-Ukraine and the common border with Hungary. In return, he expected the Poles to accept his wishes regarding Gdańsk (Łubieński, 2012, p. 142). In response to the Führer's statement about the German nature of the city and its quick return to the Third Reich, Minister Beck stated that he did not see any equivalent in this matter (PDD, 2005, p. 14; DTJS, 1972, pp. 462–464).

On January 6, 1939, Beck held a separate conversation with Minister Ribbentrop over dinner in Munich in the presence of Łubieński, during which the parties followed up on the issues of Danzig and Ukraine. The chief of Polish diplomacy said that he was greatly relieved after having heard the Führer's assurances about the lack of interest in the Ukrainian issue. Ribbentrop clarified that Berlin was interested in Soviet Ukraine as a means to weaken Russia but assured his interlocutor that Germany had never dealt with Polish Ukrainians. The top Nazi diplomat offered the Poles a close cooperation in the Ukrainian domain, which, according to him, could have become the absolute “prerogative of Poland” if the latter had agreed to resolve common problems in relations with Germany (the issue of Gdańsk and the ex-territorial highway). Ribbentrop asked whether the Poles had renounced Marshal Pilsudski's aspirations regarding Ukraine. Beck, smiling, declared that the Poles had once (in 1920) even been in Kyiv and that these dreams were, without any doubt, still alive in Poland (DBFP, 1953, pp. 159–161).

Beck's visit to Germany did not change the positions of the two sides, even though the Germans raised the stakes in talks by putting the Ukraine issue on the table. As a result of the negotiations, it became clear that there was no fundamental difference between Hitler and Ribbentrop in the matter of “general cleansing” of the Polish-German relations. Although the Nazi leaders assured Beck that their aim remained to deepen cooperation with Poland, after the meetings in Berchtesgaden and Munich, the Polish minister for the first time, according to his closest associates, became pessimistic about the prospect of reaching a compromise with Germany on the Gdańsk issue (DTJS, 1972, p. 467). Even if the Polish Minister did not find confirmation that Hitler had been personally involved in solving the Ukrainian problem, he assumed that Rosenberg and Ribbentrop could have been behind the agitation in Carpatho-Ukraine (Poland, 1976, pp. 43–45).

After Beck visited Germany, rumours began to circulate in European diplomatic circles on the postponement for several years of alleged German plans to create “Greater Ukraine” (DTJS, 1972, p. 475). It seemed that the problem of Ukraine was finally taking a secondary place, while the issue of Gdańsk was firmly established on the Nazis' agenda.

In this context, on January 25–27, 1939, German Foreign Minister Ribbentrop paid a three-day visit to Warsaw intending to continue diplomatic pressure on Poland to join an alliance with Berlin. Symbolically, the arrival of the top Nazi diplomat took place on the fifth anniversary of the signing of the German-Polish non-aggression pact. Despite Polish expectations, the topic of Carpatho-Ukraine and the broader Ukrainian issue once again found itself among the important issues on the agenda, alongside Gdańsk, the situation of the German minority in Poland, and the Soviet-Polish relations (DBFP, 1953, p. 167).

Trying to exploit the “Ukrainian map”, Ribbentrop announced that following the Beck-Hitler meeting in Berchtesgaden on January 5, 1939, the Nazis issued instructions strictly

prohibiting the German agencies from carrying out anti-Polish activities in Ukraine. The parties devoted much of the time to exchanging views on the situation in the USSR with an emphasis on the internal weakening of the Soviet state due to Stalinist repressions. Ribbentrop assured Beck of Germany's readiness to go "hand in hand" with the Poles in the event of a collapse of the central government in Moscow and the start of centrifugal tendencies in the non-Russian peripheries of the Soviet empire, as well as in the case of any external aggression by the Kremlin. In the scenario of the collapse of the Soviet Union, Berlin was ready to recognize Poland's special interests in the east and for the second time offered cooperation in solving the Ukrainian issue (PDD, 2005, p. 48). In particular, this concerned the acquisition of certain territories in Soviet Ukraine by Warsaw. The chief of Polish diplomacy did not hide the fact that Poland pursued ambitions extending to Soviet Ukraine and the Black Sea shores but denied the possibility of any German-Polish agreement directed against the Soviet Union. At the same time, Beck did not voice objections against conducting bilateral consultations with Berlin regarding the fate of the USSR and the policy in the East in case of "any fundamental changes taking place in this area". According to some sources, it was about the possibility of joint consideration of ways to solve the Ukrainian issue in the future (PDD, 2005, p. 90).

After that, Ribbentrop proposed to positively solve the problem of Carpatho-Ukraine and the common border in advance by the Polish vision. Realizing that the Germans wanted to connect these issues with the Gdańsk case, Beck deliberately rejected the proposal, since, as he later would admit to his colleagues, he did not want to "pay the mortgage on the Gdańsk track later" (DTJS, 1972, pp. 479–480). The second meeting with Ribbentrop confirmed that Carpatho-Ukraine was not included in the Nazi's far-reaching plans, and the issue of the region remained open.

An important document shedding light on the views of the pro-German wing within the Polish Ministry of Foreign Affairs on the problems of international politics and security and the role of the Ukrainian issue in the foreign policy of the Second Polish Republic is a memorial, which was prepared by the Eastern Division of the Polish MFA on January 27, 1939, apparently in the context of Ribbentrop's visit to Warsaw. It presented arguments in favour of Warsaw's policy regarding the liquidation of the so-called "Czech corridor" and the establishment of a common frontier in the Carpathians, as an important point of the Polish foreign policy in the post-Munich period. The unknown author argued that it was in Germany's interests to strengthen Poland, which could have prevented the march of the Soviet troops into Eastern Europe. This was possible in the case of Hungary's annexation of Carpatho-Ukraine and the creation of a joint Polish-Hungarian border, through which Poland, by analogy with 1920, could have received military aid from Hungary in the event of an outbreak of a new Polish-Soviet war. The document presented arguments in favour of the German-Polish cooperation in resolving the Ukrainian issue as a tool of anti-Soviet policy. "Poland will initiate the state independence of Ukraine in the event of a war between Poland and Bolshevik or some other Russia (...) When creating this state, Poland will consider Germany as its partner, just as it will seek to conclude an alliance with Germany in the event of a war with Russia" (AAN, MSZ, sygn. 5463, pp. 234–242).

This allows to establish the adaptation of the Prometheism concept to a potential union between Poland and Germany in a future war against the Soviet Union. Faced with the challenge of the Ukrainian issue due to the appearance of Carpatho-Ukraine on its southern borders, Warsaw once again sought to instrumentalize it for the realization of its geopolitical

goals. At the same time, in relations with Germany, Poland tried to seize the initiative and demonstrate its critical role in deciding the fate of a future Ukrainian state east of the Zbruch River. Trying to take into account the lessons of the Polish-Ukrainian alliance against Soviet Russia in 1920, the author of the memorial believed that the reason behind the failure of Pilsudski's policy back then was the inability to create powerful Ukrainian armed forces. "I do not want to claim that the creation of an independent Ukraine is an impossible task, on the contrary, it can be achieved with the joint efforts of Poland and Germany. And then this issue can be resolved in the interests of Poland, not against them", the author noted (AAN, MSZ, sygn. 5463, pp. 234–242).

According to Hungarian Ambassador András de Hory, the meeting in Berchtesgaden and Ribbentrop's visit to Warsaw largely dispelled the fears of the Poles regarding Germany's Ukrainian plans in the context of the Carpatho-Ukraine problem. At the same time, Warsaw realized that Germany's next strike would be directed not to the east, but to the west. This, in turn, was supposed to improve Berlin's relations with its eastern neighbours and to create prerequisites for the implementation of the common border (Hory, 2017, pp. 292–294).

Warsaw was convinced that the Reich's next foreign policy step would not concern Ukraine, but rather the issue of colonies, as one of the last uncorrected injustices of the Treaty of Versailles. According to Minister Beck, Hitler did not seek war, and by all accounts did not plan it in 1939, because he was not prepared for conflict from a military point of view. Such strategic short-sightedness and narcissism played an evil joke on the Second RP, which, having underestimated the threat from Germany, fell victim to a double aggression from the Third Reich and the USSR six months after the liquidation of Czecho-Slovakia as an independent state.

**The Conclusions.** At the turn of 1938 – 1939, the influence of the Ukrainian issue on Poland's foreign policy reached its peak, which was sparked by a general discussion of this problem in international circles in connection with the project of forming "Greater Ukraine" based on Carpatho-Ukraine. Foremost, the Ukrainian issue was used by Hitler as a "bargaining chip" and a "bait" in his strategic negotiations with Poland with the final goal to attract the latter into his military and political alliance against the Soviet Union. Despite strong fears in Warsaw, Germany's involvement in the affairs of Carpatho-Ukraine was nothing more than a means of blackmailing Poland, the biggest target in the diplomatic battle of the Nazis during the post-Munich period. One can suggest that the failure of a diplomatic "cavalry attack" on Poland at the beginning of 1939 to force it into an alliance with Germany largely prompted Hitler to speed up the development of plans to resolve the "Czechoslovak issue". By occupying Czecho-Slovakia, the Führer sought to establish the Reich's dominance in East-Central Europe to dictate his terms to Warsaw from a more advantageous military and strategic position.

Despite the existence of a pro-German wing in the Polish ruling camp, which advocated cooperation with the Third Reich in solving the Ukrainian issue and waging a joint military campaign against the USSR in the spirit of the concept of Prometheism, at the beginning of 1939, the Polish diplomacy led by Józef Beck rejected the German demands and gradually took a course towards resumption of cooperation with the Western democracies – Great Britain and France. At the same time, at least until the end of March of 1939, there was still room for the German-Polish negotiations, in which the Ukrainian issue ceased to play a decisive role. One should agree to the thesis of the Polish historian Krzysztof Rak that Hitler's decision at the time of the start of the war and the direction of the first strike largely depended on Poland's position, in particular on its choice of the appropriate military and

political alliance. Since the Polish-German alliance did not work, Hitler returned to Rapallo's idea – the German-Soviet alliance, which cleared the way for him to start World War II.

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**KHARKIV OFFENSIVE OPERATION (MAY 12–17, 1942):  
MISCALCULATIONS IN THE OPERATIONAL COMMAND**

**Abstract.** *The purpose of the research – to do the study on the organization of preparation for an offensive operation and the subsequent influence on the conduct of an offensive operation under difficult conditions of the following components: the interaction organization of large formations during the offensive, the use of troops and large mobile formations in a frontal offensive operation, the material support of troops under the conditions of an offensive with bridgeheads. The research methodology is based on the principles of historical knowledge (scientism, historicism, objectivity, systemic analysis), as well as on the use of a set of methods: dialectical, analytical, historical, biographical, comparative. The scientific novelty of the obtained results consists in the comprehensive analysis of the process of preparing and conducting an offensive front operation with the use of four tank corps, which is due to the absence in the domestic historiography of special historical generalizing works on the specified subject within the specified chronological limits. An objective assessment of the offensive operation significance of the South-Western Front has been given, as an example of unsuccessful actions for the development of military art in the operations of the German-Soviet war and its negative impact*

on the course of further military events in 1942. **The Conclusions.** The main reason for the tragedy is that the Headquarters of the Supreme High Command (actually Joseph Stalin) agreed to conduct an offensive operation at the insistence of the Military Council of the South-Western direction (SWD). A characteristic feature of management was the combination of functions: the Commander-in-Chief and his chief of staff of the South-Western direction were simultaneously the commander and chief of staff of the South-Western Front, respectively. This is a vivid example of incompetent military leadership. This incompetence gave a negative result, the actions of the SWF were carried out in isolation from the Southern Front (SF), as during the preparation, and especially during the operation. The main shortcoming of the overall planning of the offensive of the troops on the SWD was the lack of a proper operational support of the SWF strike group from the south by the SF forces. This was influenced by significant shortcomings made during the preparation and implementation of the operation.

**Key words:** World War II, offensive operation, Wehrmacht, group, front, army, corps.

### ХАРКІВСЬКА НАСТУПАЛЬНА ОПЕРАЦІЯ (12–17 травня 1942 р.): ПРОРАХУНКИ В ОПЕРАТИВНОМУ КОМАНДУВАННІ

**Анотація. Мета статті**—системно дослідити організацію підготовки наступальної операції та подальший вплив на ведення наступальної операції у непростих умовах таких складових: організація взаємодії великих з'єднань у ході наступу, використання родів військ і крупних рухомих з'єднань у фронтовій наступальній операції, матеріальне забезпечення військ в умовах наступу із плацдармів. **Методологія дослідження** ґрунтується на принципах історичного пізнання (науковість, історизм, об'єктивність, системний аналіз), а також використанні сукупності методів: діалектичного, аналітичного, історичного, біографічного, порівняльного. **Наукова новизна** одержаних результатів полягає у комплексному аналізі процесу з підготовки і проведення наступальної операції фронту із застосуванням чотирьох танкових корпусів, що зумовлено відсутністю у вітчизняній історіографії спеціальних історичних узагальнюваних праць з визначеної тематики у вказаних хронологічних межах. Дано об'єктивну оцінку значення наступальної операції Південно-Західного фронту як прикладу невдалих дій для розвитку воєнного мистецтва в операціях німецько-радянської війни та її негативного впливу на хід подальших воєнних подій у 1942 р. **Висновки.** Головною причиною трагедії є те, що Ставка ВГК (насправді Й. Сталін) погодилася на проведення наступальної операції за наполяганням Військової ради ПЗН.

Характерною особливістю управління було поєднання функцій: Головнокомандувач і його начальник штабу Південно-Західного напрямку, одночасно були командувачем і начальником штабу Південно-Західного фронту, відповідно. Це яскравий приклад бездарного керівництва військами.

Це дало негативний результат, дії ПЗФ проводилися ізольовано від ПФ як під час підготовки, так і особливо в ході ведення операції. Основним недоліком загального планування наступу військ на ПЗН була відсутність належного оперативного забезпечення ударного угруповання ПЗФ з півдня силами ПФ. На це вплинули суттєві недоліки, допущені під час підготовки і проведення операції.

**Ключові слова:** Друга світова війна, наступальна операція, вермахт, угруповання, фронт, армія, корпус.

**The Problem Statement.** World War II was the largest military conflict in a human history. During the Soviet-German war, the troops of the Workers' and Peasants' Red Army (the Soviet Army) conducted 17 strategic and 15 independent front operations on the territory of Ukraine (Hrytsiuk, 2010, p. 137).

The authors of the article consider one of the most unsuccessful offensive operations for the leadership of the Red Army, Kharkiv offensive operation (May of 1942).

It should be noted that the military and political leadership of the state took this tragic experience into account in the future when planning operations (Krivizyuk, 2019, pp. 66–74).

The success achieved by the Soviet Army in the operations of the winter campaign of 1941/1942 and in the spring of 1942 improved the military and political situation of the USSR compared to the summer of 1941, but the situation remained tense for the troops of the Soviet Army.

The growth of the military industry made it possible to improve the equipment and weapons of the military units of the Soviet Army (Rotmistrov, 1963, pp. 151–152).

For a further successful implementation of offensive operations, it was necessary to create large mobile units. Therefore, from April of 1942, tank brigades (*tbr*) began to be formed to tank corps (*tc*) (CAMD RF, f. 83, d. 80050cc, ref. 4, pp. 14–15, 53, 299–300). In May, according to the decision of the Headquarters of the Supreme High Command (SHC), the formation of Tank Army 3 and Tank Army 5 (TA) began (Russian archive, 1996, pp. 217–219).

After the successful counteroffensive near Rostov (*November 17 – December 1, 1941*) and Moscow strategic operation (*December 5, 1941 – January 7, 1942*), the leadership of the country and the armed forces decided to start active operations in other areas of the German-Soviet front. However, offensive operations in Kursk and Kharkiv directions, in the Donbas and the Crimea did not have any tangible success.

The troops of the Soviet Army managed to capture a small area and defeat only three divisions of the Wehrmacht. In the spring, the offensive actions stopped, the troops began to prepare for a new offensive. The front line stabilized (Hrytsiuk, 2010, pp. 56–61).

In Iziium area the troops of the South-Western Front (SWF) achieved some success, as a result of which a bridgehead was formed on the western bank of the Siversky Donets river in the area of Barvinkove town (Barvinkove salient), which opened up the possibility for a further offensive near Kharkiv.

The Battle of Kharkiv (the offensive operation of the SWF troops in Kharkiv direction and the counterattack by the Germans (May of 1942), according to Kyiv historians, it was not the second (as many historians believe), but the fourth battle for Kharkiv (Pyliavets, 2012, pp. 63–70; Lysenko & Pyliavets, 2013, pp. 350–351).

**The Review of Recent Researches.** The historiography issue of the Soviet-German war is extremely broad and multifaceted. A significant body of research papers on World War II is devoted to the issues of military art of the warring parties. In the Soviet historiography, due to the communist ideology, the operations in which the troops of the Soviet Army were defeated were usually hushed up, and exclusively victorious actions, i.e. offensive actions, were declared. First of all, such operations include Kharkiv offensive operation (May of 1942), when, after a counteroffensive near Moscow, there was a crushing, shameful defeat.

The Soviet historiography (Abaturov, & Portuhalskyi, 2008; Rotmistrov, 1963; *Sovetskie tankovyie voyska 1941 – 1945*, 1973), on the Battle of Kharkiv is the most numerous. Publications with the vulture completely secret and secret deserve special focus (Platonov, 1961; Platonov, 1951; Platonov, 1958). These publications were marked with a significant fact material and contained many true materials. Access to this information was restricted and publication of these documents was prohibited. The scientific work by Morozov is significant (Morozov, 1975), it contains an extensive scientific and historical material.

In the publications mentioned below the memoirs of the authors who were direct participants of those events were used (Bagramyan, 1977; Vasilevsky, 1978; Zhukov, 1983; Moskalenko, 1973; Shtemenko, 1975), which usually require verification as to their veracity.

The memoirs and publications of the German generals (Mellenthin, 2005; Tippelskirch, 1999), these are well-thought-out military and theoretical works in which the authors try to present the Wehrmacht troops as best as possible and bypass their own miscalculations.

In the study of the issues of the Battle of Kharkiv contemporary historiography (May of 1942) is characterized by a critical analysis of operational art issues. It is worth highlighting the following researchers: Y. Moshchansky, V. Daynes, A. Galushko, M. Kolomiets among

the Russian researchers (Moshchansky, 2009; Daynes, 2009; Galushko, & Kolomiets, 2010; Kolomiets, 2013). In the Ukrainian historiography, the researched issue was considered in the publications of V. Horelov, V. Kozak, O. Lysenko, I. Patrilyak, M. Borovyk, R. Pyliavets (Gorelov, 2005; Kozak, 2000; Lysenko & Pyliavets, 2013; Patrilyak & Borovyk, 2010; Pyliavets, 2012). The issues of military art of the warring parties were considered in the researches by V. Hrytsiuk, L. Kryvyziuk (Krivizyuk), O. Yurchuk, M. Kuznietsov more thoroughly (Hrytsiuk, 2010; Hrytsiuk, & Krivizyuk, 2011; Krivizyuk & Yurchuk, 2014; Kuznietsov, 2003).

The work of the Soviet security forces in identifying and fighting the Romanian intelligence and counterintelligence bodies during the German-Soviet war was studied V. Ilnytskyi, M. Haliv (Ilnytskyi, Haliv, 2019; Ilnytskyi & Haliv, 2020).

The article is also presented with the archival materials (CAMD RF; Russian archive, 1999) on the planning and operational art of using troops during the operation.

**The purpose of the research** is to do a systematic study on organization of preparation for an offensive operation and a subsequent influence on the conduct of an offensive operation under difficult conditions: the interaction organization of large formations during the offensive, the use of troops and large mobile formations in a frontal offensive operation, a material support of troops under conditions of the offensive from bridgeheads.

**The Results of the Research.** In the spring of 1942, Headquarters of the Supreme High Command worked out a strategic plan and conducted an active training of troops in order to keep the strategic initiative on the German-Soviet front in their hands. The Wehrmacht was also preparing for the summer campaign in order to gain the advantage over the enemy and once again seize the strategic initiative and finally destroy the main forces of the Soviet Union with a decisive offensive. The main offensive was planned in the southern direction. In order to keep the plans secret, according to the direction of the command of the German Ground Forces (GGF), the headquarters of Army Group “Centre” developed a plan for a special operation under the conditional name “Kremlin”. The plan implied as if the Wehrmacht troops were launching a powerful offensive in the western direction with the aim of defeating the central grouping of the forces of the Soviet Army and invading Moscow, with the expectation that this plan would have reached the command of the Soviet Army, who would be misled (Morozov, 1975, pp. 120–121; Rotmistrov, 1963, p. 155).

The Soviet command, headed by J. Stalin, was sure that the enemy would deliver a powerful strike to Moscow. Other members of the Staff, the General Staff (GS) and the majority of the front commanders shared this opinion that the central (Moscow) direction would be the main one, and other strategic directions would play a secondary role. But as it turned out later, the forecast was wrong (Shtemenko, 1975, p. 57; Horielov, 2005, p. 137).

The Supreme High Command of the Wehrmacht (SHCW) set a task for its troops: in the central part of the front – to hold the position, in the north – to invade Leningrad and establish a land connection with the Finns, and in the southern part of the front – to break through to the Caucasus. On April 5, A. Hitler signed Directive No. 41, in which there was required “first of all, all available forces must be concentrated to carry out the main operation in the southern sector with the aim of destroying the enemy west of the Don, and then invading the territory rich in oil on Caucasus and pass through the Caucasian ridge” (Daynes, 2009, p. 269; Shtemenko, 1975, pp. 57–58). A chief goal was invading an important operational and strategic area, which was supposed to be used as an initial bridgehead (CAMD RF, f. 15, d. 11600, ref. 1105, p. 6).

The Chief of the General Staff, B. M. Shaposhnikov, was adamant not to proceed to broad counter-offensive actions until the summer. G. K. Zhukov, supporting B. M. Shaposhnikov mainly, at the same time considered it absolutely necessary to defeat the Rzhevsko-Viazemska group of the enemy at the beginning of the summer (Vasilevsky, 1978, p. 189; Zhukov, 1983, p. 252; Krivizyuk & Yurchuk, 2014, pp. 244–245).

The success of the winter offensive of the Soviet Army troops gave rise to complacency and excessive self-confidence among a large part of the command and political staff; it became a very widespread opinion that the Germans, after heavy defeats, were not able to conduct large-scale offensive operations and would not be able to achieve what they managed to achieve in 1941. A significant role was also played by J. Stalin's instruction "on the complete defeat of the German-fascist invaders in 1942" (Abaturov & Portuhalskyi, 2008, p. 76).

The headquarters of the Supreme High Command, not having a sufficient number of reserves to strengthen the troops of the South-Western Strategic Direction (SWSD), rejected the idea of a broad offensive in the south. The commander-in-chief of the South-western direction (SWD) was instructed to develop a plan for a narrower operation with the aim of defeating only Kharkiv enemy group and liberating Kharkiv with all available forces.

The action plan for the SWF troops (from April 8, 1942, Marshal S. K. Tymoshenko performed his duties, concurrently being the commander-in-chief of the SWD) (Russian archive, 1996, pp. 150–151) and the Southern Front (SF) (a commander – Lieutenant General R. Ya. Malinovsky), developed by the command of the SWD, was presented to the Headquarters of the Supreme High Command on March 30 (CAMD RF, f. 229, d. 161, ref. 799, p. 278).

According to the plan, the SWF troops carried out two strikes from Vovchansk region and Barvinkove salient on Kharkiv, with the goal of defeating Kharkiv Wehrmacht group and creating favourable conditions for the development of the offensive in the Dnieper direction (Morozov, 1975, p. 127; Kuznetsov, 2023, pp. 122–128).

According to the plan, it was assumed that in the first three-day stage, during the breakthrough of the German defense to a distance of 20–30 km, the advancing troops would destroy the nearest reserves and provide an introduction into battle for the offensive development of mobile groups. At the second stage (three to four days), it was supposed to destroy the operational reserves and complete the encirclement of the enemy group. At the same time, it was planned to cut off and destroy part of the troops of the German group in the area of Chuhuyiv, Balakliya by the forces of Army 38 and the right flank of Army 6 (Hrytsiuk & Krivizyuk, 2011, pp. 379–385).

In accordance with the set goals, the main strike was delivered by Army 6 (a commander – Lieutenant General A. M. Horodniansky) on a 26-km front (as part of eight rifle divisions (*rd*), four tank brigades (*tbr*) with the support of fourteen artillery regiments (*ar*) of the reserve of the General Command (RGC)), and was supposed to break through the enemy's defenses and ensure the introduction of a mobile group (two *tc* 21 *tc* (a commander – Major General TV H. I. Kuzmin)) and 23 *tc* (a commander – Major General TV Ye. H. Pushkin) into the breakthrough).

In the future, the army, in cooperation with the mobile group, had to develop an attack on Kharkiv from the south to attack the troops of Army 28 to surround the entire enemy group (Moskalenko, 1973, p. 179; Platonov, 1961, p. 382).

To the left of Army 6, the army group (AG) (a commander – Major General L. V. Bobkin) attacked, consisting of two *rd* and one *tbr*. It was supposed to break through the enemy's

defenses and ensure the introduction of Cavalry Corps 6 (*cc*) into the breakthrough, and at the end of the fifth day of the operation to take control of Krasnohrad and secure the troops of Army 6 from the counterattacks from the west.

The second strike was carried out by Army 28 (a commander – Lieutenant General D. I. Riabyshev) on a 15-km section of the front (composed of six *rd* and four *tbr* with the support of nine *ar* RHK) with the task of breaking through the enemy's defenses and by the end of the third day of the operation ensure introduction into the breakthrough of 3 *guard cc* and motorized rifle brigade (*mrbr*). Developing the success of Army 28 in interaction with 3 *hv. cc* was supposed to bypass Kharkiv from the north and connect with 21 *tc* and 23 *tc* of Army 6.

The offensive of Army 28 was supported by: Army 21 (a commander – Major General – V. M. Hordov) from the north and north-west, Army 38 – from the south and south-west. Army 21 was supposed to break through the enemy's defenses on a 14-km section of the front.

Army 38 (a commander – Major General of Artillery K. S. Moskalenko), which included (six *rd*, three *tbr*, reinforced by six *ar* RHK and six engineer battalions), received the task of breaking through the enemy's defenses on a 26-km section of the front and by the end of the third day to reach the line of Lebedynka, Zarozhne, Piatnytske. In the future, develop the offensive in the direction of Rohan, Ternova, and with the exit of the strike group to Vedenka, Chuhuyiv area, the troops of Army 38, in cooperation with three regiments of Army 6, will complete the encirclement, defeat Chuhuyiv enemy group and prepare for the offensive on Kharkiv (Moskalenko, 1973, pp. 179–180; Platonov, 1958, p. 582).

The grouping of troops as of May 11, 1942 was as follows:

the SWF – the troops of the front basically took the starting position for the offensive. The front included: rifle divisions (*rd*) – 29, cavalry divisions (*cd*) – 9, motorized rifle divisions (*mrd*) – 1; motorized rifle brigades (*mrbr*) – 4, tank brigades (*tbr*) – 19, separate tank battalions (*tb*) – 4 (925 tanks):

– Army 21 defended Spartak area, Miasoyedovo, Prystan forces of 8 *mrd*, 297 *rd*, one regiment of 301 *rd*, and 76 *rd*, 293 *rd* and 227 *rd* reinforced by the 10 *tbr* were concentrated in the area south of Bezliudivka.

The army reserve included: two regiments of the 301 *rd* and 1 *mrbr* of 8 *otb*, which were concentrated in Chuyev, Kryvi Balky, Kholodne area.

– Army 28: construction of defense in two echelons. The first – 175 *rd*, 169 *rd*, 244 *rd* and 13 *guard rd*, reinforced 84 *tbr*, 57 *tbr*, 90 *tbr* and all artillery on Izbytske front line, Drahunovka. In the second echelon – 38 *rd* and 162 *rd* with 6 *guard tbr*. The moving group included 3 *guard cc* and 34 *mrbr*, which was located in Yefremovka, Volokhovka, Zakharovka area.

– Army 38, which defended in the centre and on the left flank of the front with forces of 199 *rd* and 304 *rd*, deployed 226 *rd*, 124 *rd*, 300 *rd* and one regiment of 81 *rd*, reinforced by 36 *tbr*, 13 *tbr* and almost all army artillery. Two regiments, 81 *rd* and 133 *tbr*, were allocated to the reserve, the area of concentration was in Molodove area.

– Army 6 defended the right bank of the North Donets river in the area of Shchurovka, Nyzhnie-Rus, Bishkin. The main forces of the army were concentrated on Verkh. Byshkin, Hrushyno front. The defense line consisted of two echelons. The first one – 253 *rd*, 41 *id*, 411 *rd* and 266 *rd* strengthened by 5 *guard tbr*, 38 *tbr*, 48 *tbr* and all army artillery.

Tank corps (269 tanks) were concentrated: 21 tanks in Krutoyarka, Novopavlivka area; 23 *tc* – in the area of Alioshky, Bunakovo (Platonov, 1951, pp. 26–27).

21 *tc* and 23 *tc* were included into the motor group of the SWF. It was planned to introduce it into the breakthrough in the offensive of Army 6 to develop an attack in the

general direction of Liubotyn and in cooperation with the 3 *cc* and complete the encirclement of Kharkiv enemy group (CAMD RF, f. 229, op. 161, ref. 779, p. 294).

277 *rd*, 343 *rd*, 2 *cc* and three *otb*, as well as 102 *rbr* and 6 *rbr* were allocated to the reserve of the SWF commander.

The Southern front (SF) – on May 7, 1942, the troops of the front began an operation in Maika area with the aim of improving the troops condition of Army 9 and creating favourable conditions for a further offensive to capture Sloviansk. Based on this, on May 11 the reserve of the front commander and troops of Army 9 had an operational structure that met the interests of the offensive, but did not provide reliable defense of Barvinkove bridgehead.

– Army 57 with 150 *rd*, 317 *rd*, 99 *rd*, 351 *rd*, 14 *guard rd* defended the area of Tsaredarivka, Krystopivka, Novo-Pavlivka, Sofiyivka – the first echelon, the second echelon – 14 *guard rd*. The army was reinforced by three artillery regiments (*ar*). The length of the army front was 80 km. The operational length was 16 km per division, 4.6 guns and mine-throwers per 1 km of the front.

– Army 9 with 341 *rd*, 106 *rd*, 349 *rd*, 335 *rd*, 51 *rd*, 333 *rd*; 78 rifle brigade (*rbr*), 121 *tbr*, 15 *tbr* five *ar* occupied the defense on a 96 km front: the area of Sofiyivka, Alisovka north. Mayaky, Brusivka.

The operational density was 10 km per division, 10–12 guns and mine-throwers per 1 km of the front.

One regiment of Rifle Division 333 was in the army commander's reserve in Barvinkove area.

– thirteen *rd* and one *rbr* were left in defense areas of Army 37, Army 12, Army 18 and Army 56 during regrouping in the first echelon. 296 *rd*, 176 *rd*, 216 *rd* were allocated to the reserve of army commanders, respectively, and the commander of Army 56 – 3 guard Rifle Corps (*rc*) (2 *Guards Corps*, 76 *rbr*, 81 *rbr*, 68 *rbr* and 63 *tbr*).

In the reserve of the SF commander, there were 24 *tc* (24 *msbr*, 4 *guard tbr*, 2 *tbr* and 54 *tbr*), 5 *cc* (60 *cd*, 34 *cd*, 30 *guard cd* and 12 *tbr*), 347 *guard rd*, 255 *guard rd*, 15 *guard rd* and 102 *rd*, 73 *rd*, 242 *rd* and 282 *rd* transferred by the Supreme High Command Headquarters. But the reserves were allowed to be used only with the permission of the Supreme High Command Headquarters (Order No. 13986), except for 24 *tc* and 5 *cc*.

On the front line of Army 57 and Army 9, the troops occupying the southern line of Barvinkove salient, the defense was built from strongholds of resistance. The battle divisions were not echeloned, so the depth of the tactical defense reached only 3–4 km. Being in the defense for one and a half months, work on the creation of defensive and engineering barriers was carried out unsatisfactorily. In defense zones Army 57 and Army 9, the density of barriers, per 1 km of the front, was only about three tree-ground defense points, 25–30 anti-infantry mines and about 80 anti-tank mines. And along the entire 180-km front, there were only 11 km of wire fences. Therefore, neither the operational construction of troops Army 57 and Army 9 the SF in defense, nor the engineering arrangement of the area, which was accessible to tanks, provided a reliable defense of the southern wing of Barvinkove salient.

In the reserve of the Commander-in-Chief of the SWD there were 277 *rd*, 343 *rd*, 2 *cc* and three *otb* (Platonov, 1951, pp. 27–28).

Before the start of the offensive, the command of the Soviet Army concentrated a fairly powerful tank group, which included 3 *tc* (21, 22 and 23) and 9 *tbr* (5, 6, 7, 10, 37, 38, 42, 87 and 90), which numbered 925 tanks. Separate *tbr* were included in strike groups and



BPP *rd* of the first echelon. 22 *tc* was included into Army 38. The army commander used the *tc* decentralized, transferring the *tbr* to the rifle divisions (Sovetskie tankovyie voyska, 1973, p. 58).

Tank corps – the main weapon of the Soviet Army in the 1942 campaign and their main purpose was to break through the defense in the offensive line of the SWF.

Grouping of Wehrmacht troops. As a result of the regrouping of the troops, the density of German troops in the main line of defense and in the areas of the strike groups of the SWF and before the line of Army 57 and Army 9 of the SF was significantly increased. And this was contributed to by the failure of the SWF and SF Headquarters to maintain the secrecy of management and improper operational camouflage during the concentration of troops in the planned areas of the breakthrough, the German command revealed the intentions of the Soviet Army command and extremely quickly (mainly from May 1 to 11) carried out a series of measures to strengthen the defense line in dangerous directions at the expense of Army 6, Army 17 and the arriving reserves, and powerful reserves were concentrated in the operational area.

The day before the offensive, the troops of the German Army 6 (a commander – General of tank forces F. Paulus) as part of the 29, 17, 51 and 8 army corps (*ac*) and 4 *id* 6 *ac* (Romanian), which was part of Army 17, were involved in the hostilities (a commander – Colonel-General Hans von Salmutt).

17 *ac* (79 *id* and 294 *id*) defended the area of Maslova Prystan, Pischane front. 51 *ac* (297 *id* and 44 *id*) defended Chuhuyiv bridgehead on the front line of Pechenihiy, Balakliya, Cherkasky Byshkyn.

In Krasnohrad direction, there were 8 *ac* (108 *lid* of the Hungarians, 62 *id*, 454 guard division (*gd*), which occupied the defense on the border: Verkhniy Byshkyn, Hrushyne, Myronivka. 113 *id* – the operational reserve of the commander of Army 6, was located in Berestovenka area, Kozachi Maidany, Andriyivka. The units of 4 *id* of the Romanians occupied the defense on the front line of Myronivka, Pokrovske.

The units of 3 *td*, 23d *td* and 71 *id* concentrated in Kharkiv, and two regiments of this division were on the march to Balakliya, and Division 211 was reinforced by 294 *id*. On the approach to Kharkiv there were the advanced units of Infantry Division 305.

Thus, in the SWF, there were up to fifteen *id* and two *td*. And according to the SWF Headquarters it was supposed to be 12 and 1, respectively.

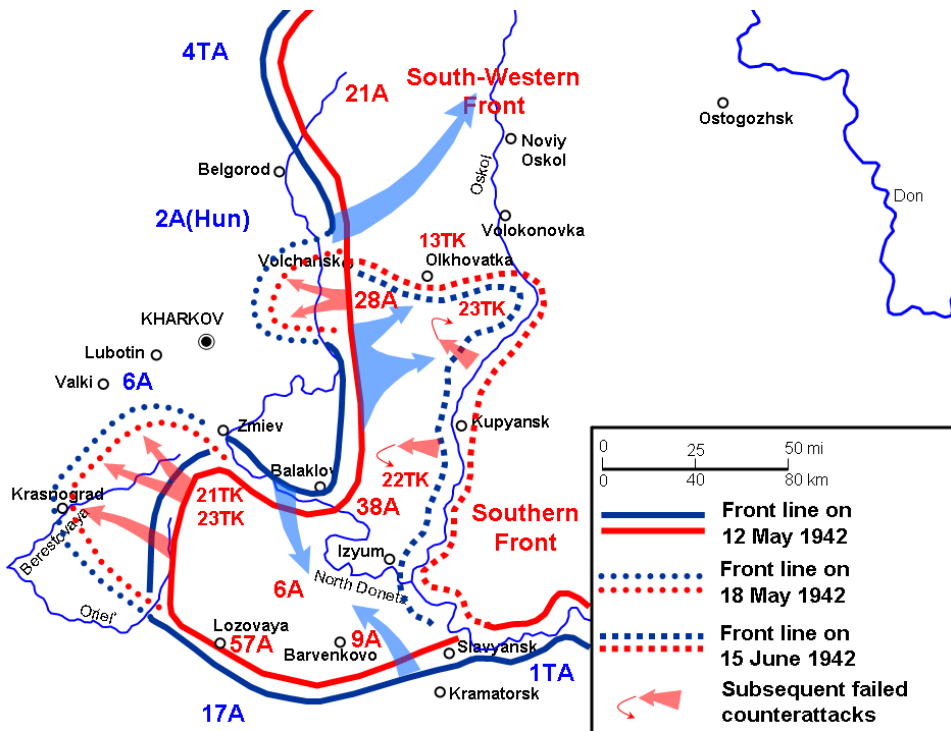
In the SF, the command of the Wehrmacht increased the number of troops by six divisions.

The operational reserve of the Germans in front of the southern wing of the Barvinkove salient was concentrated: 389 *id*, 384 *id*, 101 *lid*, 20 *id* (Romanian) and 16 *td*.

In the SF, the grouping of German troops numbered thirty-four divisions, namely: *id* – 24, *td* – 3, motorized (*md*) – 5 and *rd* – 2.

In the SWF the ratio of troops on May 12 was: in favour of the *rd* – 2.1:1, in tanks – 2.5:1, in guns – 1.3:1, mine-throwers – 1.7: in favour of the Soviet Army, and in *cd* – absolute advantage (9), the Germans had none.

In the SF – the advantage of the Soviet Army: in the *rd* 1.2:1; *cd* – 1.5:1, mine-throwers – 3.8:1. But tanks – 1:2.4, guns – 1:1.9, the advantage of the Wehrmacht (Platonov, 1951, pp. 29–32).



The offensive of the troops of the SWF strike groups began in the morning of May 12 after an hour of artillery and aviation activity (Daynes, 2009, p. 268).

There was no suddenness in the enemy's actions for the opposing sides. The German command was extremely lucky that, due to a pilot error, the commander of Army 48 O. H. Samokhin, who flew to the front from Moscow, got to them. There were secret documents with him revealing the future offensive of the SWF from the Barvinkove salient. But the military leadership of the Soviet Army did not cancel the offensive (Moshchansky, 2009, p. 21).

Army 21 and Army 38 units achieved the best success in advancing deep into the Nazi defenses. On the night of May 12, units of the 76 *rd* of Army 21 captured small bridgeheads to the west on the banks of the North Donets River, and in the morning the division began an offensive with the main forces, and by the end of the day, parts of the division had united and formed a common bridgehead 5 km wide and up to 4 km deep.

293 *rd* and 227 *rd* of Army 21 successfully broke through the enemy's defensive line and, developing success, by the end of the day, having captured several settlements, advanced 10 km in the north direction and 6–8 km in the north-west direction. However, the units of Division 76 and Division 293 failed to create a common bridgehead during the day.

Successfully operated 10 *tbr*. "10 *tbr* in cooperation with 277 *rd* at 7.30 from the border of 103.1, 112.2 went on the offensive, and by 6 p.m. Dehtiarivka, Izbitske were under control..." (Kolomiets, 2013, pp. 23–25).

The Units of Army 28 were less successful. Heavy, bloody battles broke out in the line of its offensive. The enemy had fortified this area of defense well, creating high tactical densities and preparing settlements for a circular defense. And only soldiers 13 *guard rd*

managed to break through the enemy's defenses and defeat it in the stronghold Peremoha Victor in combat with the soldiers of 90 *guard tbr*.

As a result of the first day of the offensive, the troops of the northern strike group broke through the enemy's main line of defense, advancing to a depth of 6 to 10 km. The Southern Strike Group, having broken the enemy's resistance on the front of more than 40 km, wedged itself into the depth of the defense of the 51st and 8th German Army Corps 51 and 8 and (GAC) by 12–15 km. Army 6 and General L. Bobkin's AH units reached the second defensive line, created on the western bank of the Oril River (Abaturov & Portuhalskyi, 2008, pp. 87–89; Kolomiets, 2013, pp. 23–25).

Summing up the results of the first day of the offensive, the commander of the SWD ordered the commander of Army 6 to speed up the advance of the second echelon. For aviation – to carry out aerial reconnaissance and determine the composition and nature of actions of the German troops reserves in Kharkiv and Zaporizhzhia area. Anticipating the possibility of an enemy counterattack, the commander of Army 38 received an order to withdraw brigades of 22 *tc* (13 *tbr*, 36 *tbr* and 133 *tbr*) and concentrate them by dawn on May 13 behind the left flank of Army 38 with the task of covering Starosaltiv direction. There were no anti-tank constructions by engineering means at the specified direction. Following the order, the units of Echelon 2 of Army 28 were moved to the east of the bank of the North Donets River, and 162 *rd* on the night of May 13 began crossing to the west bank of the river in Verkhniy Saltiv area (Daynes, 2009, p. 268; Platonov, 1951, p. 36).

It should be noted that the command of Army 6 of the Wehrmacht from the beginning of the SWF offensive directed its main efforts to maintaining the first (main) line of defense, using divisional reserves for counterattacks. Corps reserves were concentrated at a depth of 4–8 km ready for counterattacks and the defense of the nearest approaches to Kharkiv, since the German command considered the northern direction the most threatening.

The units of 76 *rd* and 293 *rd* of Army 21 the next day, although they captured the bridgehead on the western bank of the Siversky Donets, they could not advance deep into the German defenses. The left flank 227 *rd* had the greatest success and advanced 12 km. The unit of Army 28 was also successful and advanced 6 km (Galushko & Kolomiets, 2010, pp. 20–22).

Divisions of Army 38 continued the offensive in their lane. Until 1 p.m. advanced 6 km and there was the combat near the villages of Chervona Rohanka and Velyka Babka. 13 *tbr* and 133 *tbr* also reached this milestone. But in the afternoon, the situation changed dramatically.

It was a surprise for the SWD command that the enemy concentrated two strike groups. The first (3 *td* and two regiments of 71 *id*) was located in Pryvillia area; the second (23 *td* and one regiment of 44 *id*) – in Zarozhne area. At the same time, the enemy made a strong counterattack (about 400 tanks with infantry, supported by aviation) against the troops of the right flank of Army 38, who were forced to retreat to the eastern bank of the Velyka Babka River, opening the left flank of Army 28.

The front commander, having analyzed the situation, ordered Artillery Major General K. S. Moskalenko to occupy the defense on the eastern bank of the Velyka Babka River (the rear defensive line), to prevent the enemy's tanks from breaking through to Stary Saltiv, which threatened to encircle the entire northern strike group and eliminate the bridgehead beyond the Southern Donets River. In accordance with this order, the army was reinforced by 162 *rd* and 6 *guard tbr* that were excluded from the reserve of Army 28 (Moskalenko, 1973, p. 190).

In his memoirs I. Bagramyan writes that he and the Glavkom were informed of the tank divisions, but intelligence did not detect any infantry units (Bagramyan, 1977, pp. 89–90).

On the night of May 13, part of the second echelon of Army 6 – 103 *rd* and 248 *rd* – began advancing. And the units of the mobile group (21 *tc* and 23 *tc*) remained in the former areas. In connection with the advance of the troops, the distance from the areas of their location to the front line increased and reached 35 km (Platonov, 1951, pp. 39–41).

During the first three days of the offensive operation, the SWF troops broke through the enemy's defenses, expanded the breakthrough along the front to 55 km in the northern section and 25–50 km deep into the German defense. The German group suffered heavy losses: Division 515 and Division 208, Infantry Division 62, Guard Division 454 and four separate battalions were completely destroyed. Infantry Division 79, Infantry Division 294, Infantry Division 71, Infantry Division 62, Infantry Division 44, Infantry Division 113, 108 light infantry division of the Hungarians, 3 *td* and 23 *td* suffered heavy losses. Under the conditions, it would have been the most effective means of delivering a powerful strike by two tank corps for the development of the offensive of the southern group and an extremely important help to the northern group. Marshal S. K. Tymoshenko's refusal to use other echelons and the success development echelon in the offensive lane of Army 6 during the period of May 13–14 had negative consequences for the further course of the operation. The enemy was given the opportunity to regroup its forces and organize the defense at the front lines (Platonov, 1951, p. 45; Daynes, 2009, p. 269).

Carrying out the assigned task, on May 15, Army 6 and the army group continued their offensive. The command of the Wehrmacht used the moment of weakened cover of the advancing enemy's troops from the air and intensified the actions of their aviation. During the day, they inflicted significant losses and delayed the advance of tank corps. This significantly affected the pace of the offensive and effectiveness of Army 6. Despite the difficulties, the troops of the southern group of the SWF advanced and created conditions for the breakthrough of 21 *tc* and 23 *tc* in the main direction. But at that time the tank corps located at a distance of 25 – 35 km from the area of combat lines and could not enter the breakthrough in time and develop the success of the advancing units (Moshchanskyi, 2009, pp. 82–83).

According to the offensive operation plan, the troops of Army 28 were supposed to develop an offensive to cover Kharkiv from the north and north-west in order to surround and destroy the entire Kharkiv enemy group in cooperation with Army 6. And troops of Army 38 and Army 21 were to, developing the success of the offensive, provide flanks of Army 28.

Based on the specific situation, the SWF commander gave orders to continue the offensive on the morning of May 15 to Army 21 only and two right-flank divisions of Army 28. Two left-flank divisions of Army 28 and the entire Army 38 received an order to entrench at the achieved boundaries with the task of securing the flanks of the strike group.

From the morning of May 15, the troops of Army 21 began to carry out their tasks, but after meeting the fierce resistance of the enemy, they did not succeed, and the operational situation in the northern sector continued to get more complicated (Galushko & Kolomiets, 2010, pp. 38–39).

On May 16 the battles of the Northern Strike Group were mostly defensive in their nature. The enemy made several strong counterattacks. They were repulsed, but Army 21 unit could not advance (Abaturov & Portuhalskyi, 2008, p. 103).

Due to the failure of Kharkiv offensive, the defense of the forces of the Soviet Army on the SF and SWF turned out to be radically weakened, and the German troops launched a successful counteroffensive. On May 17, the army group (Tank Army 1 and Army 17) of Colonel General Kleist unexpectedly made a powerful attack from Kramatorsk area on the flank of the advancing Soviet Army group from the south. At the same time, from the north, Army 6 began an offensive against the AG troops. Having broken through the defense front

of Army 9, it began to threaten Army 57 of the SF, and then the strike group of the SWF. As it turned out, the command and headquarters of the SWD, while planning the operation, did not take the necessary measures to secure their strike group from Sloviansk direction (Vasilevsky, 1978, p. 189; Patrilyak & Borovyk, 2010, p. 142; Tippelskirch, 1999, p. 316).

The offensive actions of the SWF stopped, and the Wehrmacht troops began to carry out their offensive operation, under the conditional name “Friderikus – 1”, during which they achieved triumph, and the command of the South-Western direction – a shameful defeat.

According to the Germans, losses of the Soviet Army amounted to 239,000 soldiers and commanders. And according to the calculations of the Ukrainian historian V. M. Kozak – not less than 320 thousand people (Kozak, 2000, p. 129). Many famous military commanders died among them – the deputy commander of the SWF, Lieutenant General F. Kostenko, the commander of Army 6, Lieutenant General O. Horodniansky, the commander of Army 57, Lieutenant General K. Podlas, Major General A. Anisov, Major General of Artillery Fedir Maliarov, Commander of the Army Group Major General L. Bobkin, Commander of Division 47 Major General P. Matykin, Commander of Division 270 Major General Z. Kutlin, Commander of Division 337 Major General I. Vasyliyev (Vasilevsky, 1978, p. 196).

Thus, as a result of the unsuccessful actions of the SWF and SF troops on the Barvinkove salient, the strike force was significantly weakened. Therefore, the military and political leadership of the USSR was forced to abandon the offensive operations planned for the summer of 1942 (Morozov, 1975, p. 131; Mellenthin, 2005, p. 198).

The defeat of the Soviet Army near Kharkiv allowed the Wehrmacht to concentrate its strike group there and begin preparations for a new general offensive on the southern flank of the Eastern Front.

From June 28 to July 24 the defensive battles of the Soviet Army in the south-western direction ended in defeat and they were forced to retreat 150 – 400 km and switch to defense on the approaches to Stalingrad and the Caucasus (Kryvyziuk, 2018, p. 53).

The headquarters of the Supreme High Command took into account the negative experience of Kharkiv operation, and during the winter campaign of 1942 – 1943, which began with the offensive near Stalingrad, the Soviet Army achieved significant strategic success (Kryvyziuk & Zabolotniuk, 2023, pp. 312).

In subsequent operations the success of the Soviet Army was paid by the Soviet people at a high price, with large-scale human losses. Losses of killed, wounded and missing many times exceeded the losses of the Wehrmacht. The military and political leadership of the Soviet Union did not count on the loss of its people.

For example, the results of the Battle of Kursk were disappointing for the Soviet Union in terms of the loss ratio. The total losses of the Soviet troops in the Oriol operation, according to some estimates, reached 429,890 people, of whom 112,529 were irreversible, and 317,361 were medical; average daily – 11,313 people, 2,586 tanks. According to other data, – 860,000 people. The total losses of the Soviet forces during their offensive operations, the Battle of Kursk, are estimated at approximately 1,677,000 killed, captured, wounded and sick compared to 360,000 of the Wehrmacht forces approximately (Kryvyziuk & Tkachuk, 2020, pp. 182–183).

Only during the November operation, losses amounted to 568 tanks and SAU, of which 167 burned during Kyiv strategic offensive operation from October 12 to November 13, 1943 (Kryvyziuk & Tkachuk, 2022, p. 248).

During the Vistula-Oder strategic offensive operation, which the command of the Polish Air Force considers to be a model of a lightning operation, the losses of the Polish Air Force amounted to only 193,125 people, of whom 43,251 were irretrievable, tanks and self-propelled guns – 1,267, average daily losses – 56 (Kryvyziuk & Tkachuk, 2021, p. 187).

80 years have passed since the events when the new “Slobozhanska offensive operation” or “Balakliysko-Kupianska offensive operation” took place in Kharkiv region (Kharuk, 2023, pp. 5–19).

Historians and experts compare the September Kharkiv offensive (2022) with the “Friderikus” operation and call the operation of the Armed Forces of Ukraine unique. A brilliant victory was won over the rashysts, who were superior in weapons and amount of soldiers.

**The Conclusions.** Summing up the offensive operation of the South-Western Front (May 12–17, 1942), it should be considered as an example of unsuccessful actions.

The main reason for the tragedy is that the Headquarters of the Supreme High Command (actually J. Stalin) agreed to conduct the offensive operation at the insistence of the Military Council of the SWD.

A characteristic feature of management was the combination of functions: the Commander-in-Chief and Chief of staff of the South-Western Direction were simultaneously the Commander and Chief of staff of the South-Western Front, respectively. This is a vivid example of incompetent military leadership.

This incompetence gave a negative result, the actions of the SWF were carried out in isolation from the actions of the SF, as during preparation, and especially during the operation. The main shortcoming of the overall planning of the offensive of the troops on the SWF was the lack of a proper operational support of the SWF strike group from the south by the SF forces.

Important shortcomings during the preparation are:

- the SWF commander, having a significant advantage (more than twice) over the enemy, was unable to create a decisive superiority in forces over the enemy either in the northern or the southern areas. The plan of the operation, the purpose of which was to cover the flanks and subsequently encircle the Kharkiv group of the Wehrmacht, took into account only the forces of this particular group, and even then they were underestimated. As for the group of Kleist that acted against the SF (Army 17 and Tank Army 1), it was not taken into account during planning;

- the drawback not to take into account the possibilities of a use of the SWF and the SF aircraft to support the advancing troops, as well as the lack of interaction between the aircraft of the fronts;

- insufficient knowledge of the enemy group and underestimation of its capabilities during the maneuver of reserves to threatening areas;

- lack of clarity in the work of the SWF headquarters and army headquarters;

- failure to observe the secrecy of the troops concentration allowed the German command to reveal the plan of the SWF commander and conduct a counter-maneuver in advance;

- inconsistency in the distribution of artillery and tank means between the main and secondary directions, and therefore the tactical density in the southern part of the breakthrough was insufficient;

- the newly formed Army 28 was mistakenly assigned to the strike group of the northern direction;

- a large stretching into the depth of strike groups of the SWF;

- no interaction between the military branches;

- inability to use radio communication;

- a combat training was organized in the SWF troops formally.

During the offensive operation:

- planning miscalculations were discovered late;

- an incorrect use of the second echelons and mobile groups (21 *tc* and 23 *tc*) did not allow them to enter the breakthrough in time for the development of the offensive. In the

northern and southern grouping of troops, the troops of the first echelons were not supported, weakened the pace of the offensive, which allowed the German command to use the time to strengthen its first echelon;

- aviation during the offensive was used in a decentralized manner, and the situation demanded the concentration of aviation actions;
- tank brigades were used mainly for direct support of the infantry and often acted without interaction with the infantry;
- artillery maneuvers were practically not carried out;
- engineering units were very rarely used. Neither in the armies nor the divisions there were created anti-tank reserves and blockade units to cover tank-dangerous directions;
- the unsatisfactory work of intelligence did not allow to draw correct conclusions about the actions of the enemy and this affected the result of offensive actions;
- the rear bodies did not cope with the tasks of providing material and technical means to the advancing troops.

Although it was a bitter experience for the leadership of the Soviet Army, it played a positive role in the defeat of the Wehrmacht in the future.

Operational art in the counteroffensive near Stalingrad was characterized by a large scale of frontal and army offensive operations in which a mixed tank army, tank and mechanized corps were involved. Tank and mechanized corps were used to develop success in the direction of the main strike and actions in operational depth.

The combat experience gained in the battle on the Volga served as a more important basis for the further development of the combat skills of the Soviet Army. From this experience, the troops learned the art of encirclement and destroying large groups of the enemy.

The unusual use of Tank Army 6 in Korsun-Shevchenkivky Front offensive operation in the first echelon of the front to break through the enemy's defenses, Guards Army 5 and Tank Army 6 for defense on the external front was effective and efficient. The bold and decisive maneuver of the tank troops ensured operational suddenness at the beginning of the operation, and during the operation created the necessary conditions for completing the encirclement and successfully repelling the counterattacks of the enemy's tank groups. The main forces of the tank armies of both fronts were used to develop success and complete the encirclement of the enemy.

Characteristic of Korsun-Shevchenkivsky operation is that in it the encirclement and destruction of the enemy was carried out without stopping. The encirclement of the enemy group was carried out at a fast pace, especially if we take into account the adverse weather conditions in which the combat was conducted.

Kyiv strategic offensive operation is characterized by organization, covert and rapid regrouping of mobile troops from Bukrynsky to Liutizky bridgehead. And as a result, a strategically important bridgehead was created at a depth of up to 145 km in Kyiv area, which played a huge role in the deployment of further offensive operations to liberate Right-Bank Ukraine from the enemy.

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**HYBRID WAR AS AN TOOL OF FOREIGN POLICY  
OF THE RUSSIAN FEDERATION: THE UKRAINIAN DIMENSION (1991 – 2023)**

**Abstract.** *The purpose of the research is the need to clarify the hybrid aggression periodization of the Russian Federation (RF) against Ukraine and to substantiate the scientific hypothesis that the start of its implementation was directly linked to the change in the state-political course of the newly proclaimed Ukrainian state in 1991. The scientific research is also aimed at studying the system of means concerning the hybrid influence of the Russian Federation on the state and political life of Ukraine, to develop general recommendations regarding the choice of directions for organized countermeasures to this kind of aggression. The Methodology of the Research.* In order to achieve the set goal, a complex of general scientific (analysis, synthesis, induction, deduction, modelling) and special (content analysis, historical genetic, historical legal, historical typological, historical systemic, retrospective) methods of cognition have been used. **The Scientific Novelty.** For the first time there have been presented the results of a comprehensive scientific study of the historical and political aspects of Russia's conduct of a hybrid war against Ukraine. The prerequisites, which contributed to the hybrid war deployment have been analysed, the means and methods of its conduct have been elucidated, and recommendations have been formulated for the development of a system of collective resistance to this kind of aggression. It has been proven that the first “attacks” of Russia's hybrid war against Ukraine

began after the declaration of Ukrainian independence. **The Conclusion.** The hybrid war of the Russian Federation against Ukraine began from the time of its declaration of independence and the creation of a sovereign state, intensified after the Revolution of Dignity, as a result of the mass expression of the will of the people of Ukraine regarding the choice of the geopolitical path of the development of their country, and turned into an open war in 2022. Taking into account the events related to the Russian invasion of 2022, it can be argued that, in addition to Ukraine, victims of the hybrid influence of the Russian Federation are also other states of the post-Soviet camp, in particular Belarus, from whose territory the Russian troops entered the territory of Ukraine in 2022, and there was missile shelling and drone attacks. Moldova is also a victim of the hybrid war of the Russian Federation, within which the political situation is currently actively shaking up with the aim of removing the current political leaders from power and replacing them with the pro-Russian ones, simultaneously with threats about the participation of the Russian troops in the event of an escalation of the conflict with the Transnistrian Moldavian Republic. Mass protests in Georgia, which recently have taken place due to the adoption of the law on foreign agents by the Georgian parliament, against the background of a gradual change in the country's political course towards the collapse of democracy and rapprochement with Russia, are also a direct sign of the Russian hybrid influence. Finally, the results of the vote of the UN General Assembly on February 23, 2023 regarding the resolution calling on Russia to stop the hostilities and withdraw its troops from Ukraine, and among the countries that abstained were Armenia, Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan, show that the front of the hybrid war waged by the Russian Federation is extremely broad. The results of Russia's hybrid influence on the state life and politics of individual countries pose a threat to international security and destroy the world legal order.

**Key words:** hybrid war, hybrid threats, Russian-Ukrainian war.

## ГІБРИДНА ВІЙНА ЯК ІНСТРУМЕНТ ЗОВНІШНЬОЇ ПОЛІТИКИ РОСІЙСЬКОЇ ФЕДЕРАЦІЇ: УКРАЇНСЬКИЙ ВИМІР (1991 – 2023)

**Анотація.** Метою дослідження стала необхідність уточнення періодизації гібридної агресії Російської Федерації (РФ) проти України, обґрунтування наукової гіпотези, що початок її здійснення безпосередньо пов'язаний зі зміною у 1991 році державно-політичного курсу новопроголошеної української держави. Наукове дослідження також мало на меті вивчення системи засобів гібридного впливу РФ на державно-політичне життя України, розробку загальних рекомендацій щодо вибору напрямів організованої протидії такого роду агресіям. **Методологія дослідження.** Для досягнення поставленої мети у процесі роботи використано комплекс загальнонаукових (аналіз, синтез, індукція, дедукція, моделювання) і спеціальних (контент-аналіз, історико-генетичний, історико-правовий, історико-типологічний, історико-системний, ретроспективний) методів пізнання. Застосування їх у єдності та взаємозв'язку зумовило наукову об'єктивність, повноту й достовірність результатів дослідження, а також обґрунтованість, наукову новизну і коректність сформульованих висновків. Зокрема доведено, що гібридна війна Росії проти України розпочалася від часу проголошення нашою країною незалежності. У зв'язку із анексією Криму й початком бойових дій на Сході держави у 2014 року вона набула більш агресивної форми, а після 24 лютого 2023 року перетекла у широкомасштабне збройне протистояння внаслідок акту відкритої воєнної агресії Росії проти України. **Наукова новизна.** Пропонована стаття є одним із перших комплексних наукових досліджень історико-політичних аспектів ведення росією гібридної війни проти України, де у розрізі сучасної воєнно-політичної обстановки проаналізовано передумови, що сприяли її роззортанню, розкрито засоби й методи ведення та сформульовано рекомендації щодо розбудови системи колективної протидії такого роду агресіям. **Висновки.** Гібридна війна РФ проти України розпочалася від часу проголошення нею незалежності та створення суверенної держави, загострилася після Революції Гідності як результату масового волевиявлення народу України щодо вибору геополітичного шляху розвитку своєї країни, й переросла у відкриту війну у 2022 р. Ураховуючи події, пов'язані із російським вторгненням 2022 р., можна стверджувати, що, крім України, жертвами гібридного впливу РФ є також інші держави пострадянського табору, зокрема Білорусь, з території якої війська РФ заходили на територію України, звідки велися ракетні обстріли й атаки дронів. Жертвою гібридної війни РФ є також Молдова, всередині якої зараз

*активно розхитується політична ситуація на предмет усунення від влади політичних лідерів та заміну їх на проросійських, одночасно з погрозами про участь російських військ у випадку загострення конфлікту з Придністровською Молдавською Республікою. Масові протести у Грузії, які нещодавно прокотилися через прийняття парламентом країни закону про іноагентів, на фоні поступової зміни політичного курсу країни в бік згортання демократії та зближення з Росією, теж є прямою ознакою російського гібридного впливу. Вреїсті результати голосування Генасамблеї ООН від 23 лютого 2023 р. щодо резолюції із закликом до Росії зупинити бойові дії та вивести свої війська з України, де серед країн, які утримались – Вірменія, Казахстан, Киргизстан, Таджикистан, Узбекистан, свідчать, що фронт гібридної війни, яка ведеться РФ, надзвичайно широкий. Результати гібридного впливу Росії на державне життя і політику окремих країн становлять загрозу міжнародній безпеці та руйнують світовий правопорядок.*

**Ключові слова:** гібридна війна, гібридні загрози, російсько-українська війна.

**The Problem Statement.** The full-scale Russian aggression that began on the morning of February 24, 2022 with a massive missile attack on the critical infrastructure of Ukraine and the invasion of its territory by the Russian troops is one of the bloodiest armed conflicts of our time, which is closely observed by the entire civilized world nowadays. The groundless Russian invasion received a strong condemnation by the international community. The world supports Ukraine, helps it with weapons, provides material and humanitarian aid, while at the same time trying to prevent the spread of the war to the European territories and to avoid a direct clash between the NATO troops and the forces of the Russian Federation (hereinafter – RF), which would mean the beginning of World War III, as one of the greatest threats to the mankind existence, along with ecological catastrophe and overpopulation crisis.

Numerous casualties and economies destruction of the warring parties during World War II proved ineffectiveness of the military method of resolving geopolitical conflicts. At the same time, during the second half of the 20<sup>th</sup> century the rapid scientific and technical progress led to the emergence of new types of weapons of mass destruction, the use of which in the hostilities can lead to a catastrophe of a planetary scale. However, the geopolitical conflict between the West and the USSR, which arose in the struggle for world leadership at that time, remained unresolved and turned into the Cold War, which in many respects was of a hybrid nature (Honchar & Chubyk, 2017, p. 8). The world politics established new rules of the political game, according to which the force methods of solving geopolitical conflicts began to play a secondary role and gave way to political, economic and information measures of influence due to several reasons: an increasing arms race, a surplus of the number of local military conflicts that broke out in different parts of the world, a constant threat of resumption of a full-scale war. Nowadays such phenomena and processes are covered by the concept of “hybrid war” or “hybrid confrontation” as a way of resolving interstate conflicts aggressively without the direct use of weapons or with their covert use, the purpose of which is to implement the geostrategic interests of individual international players in a certain territory.

Taking into consideration the content of the events that preceded the open Russian attack, numerous scholars and practitioners claim that the Russo-Ukrainian war has been going on since 2014, since the Crimea annexation and instigation of the hostilities, disguised as the Civil War, in the territories of Luhansk and Donetsk regions. This war, accordingly, has “hot” and “cold” phases, when the open hostilities against Ukraine were not conducted, but the means of a “hybrid” war were used, when the achievement of political goals was ensured by diplomatic, economic, informational and, in the vast majority, other non-military means the purpose of which was to weaken state sovereignty, undermine economic and political stability in Ukraine, and reduce its defense potential. At the same time, a retrospective analysis of the

history of the above-mentioned issue gives reason to assert that the hybrid aggression of the Russian Federation against Ukraine began from the time of its withdrawal from the Soviet Union and the declaration of independence, intensified after the annexation of the Crimea by Russia and the start of hostilities in Donbas, and in 2022 the hybrid aggression acquired the features of a conventional war. Taking into account the above-mentioned, the periodization issues of Russia's hybrid war against Ukraine require the study and scientific justification.

There is no doubt that the Russo-Ukrainian conflict, even in the event of Ukraine's military victory, will not end with the complete capitulation of the Russian Federation and its transition to a foreign rule, but will only move from an open phase to a closed one. It should not be ruled out that the means and methods of waging hybrid wars, widely used by Russia in the confrontation with Ukraine, may be used by other states in solving similar geopolitical conflicts and contradictions. In this context, the **purpose of the research** is to study the historical experience of conducting a hybrid war against Ukraine by Russia in order to find the ways to counter hybrid attacks and minimize the subsequent risks of inspiring open armed conflicts, as well as to localize potential negative consequences of hybrid attacks.

**The Review of Recent Researches and Publications.** Numerous researches done by domestic and foreign scholars focused on the scientific and practical analysis of the issues on detecting and countering the hybrid encroachments, the researches in which there were studied various aspects of this issue (Levchenko, 2022; Haliv & Sviontyk, 2023). In particular, the analysis of the hybrid war phenomenon in the light of the Ukrainian experience was carried out in the collective monograph "World Hybrid War: Ukrainian Forefront" (Horbulin, 2016), collections of analytical materials "The Wars – XXI: Russia's Polyhybridization" (Honchar & Chubyk, 2017), "Hybrid Threats to Ukraine and Public Security" (Martyniuk, 2018), the publications by E. Mahda (Mahda, 2015), I. Rushchenko (Rushchenko, 2015; Rushchenko, 2020), Yu. Hajduk and T. Stepniowski (Hajduk & Stepniowski, 2016), O. Danyliuk (2021) and other scholars. The epistemological and philosophical aspects of a socio-political nature of the hybrid war are elaborated in the works by Z. Dubniak (Dubniak, 2023), M. Vardanian (Vardanian, 2023). We should also note the analytical reports of foreign experts and researchers: a senior researcher of the Finnish Institute of International Affairs A. Rácz (Rácz, 2015), the British analyst K. Giles (Giles, 2015), the German political scholar A. Umland (Umland, 2016), the American expert M. Clark (Clark, 2020). The nature of the Russo-Ukrainian war was studied by L. Zalizniak (Zalizniak, 2016), O. Lysenko (Lysenko, 2022), A. Kyrydon and S. Troian (Kyrydon & Troian, 2022), V. Smolii and O. Yas (Smolii & Yas, 2022), M. Haliv and V. Ilnytskyi (Haliv & Ilnytskyi, 2023), V. Telvak and V. Ilnytskyi (Telvak & Ilnytskyi, 2023), and the others. The ideological foundations of Russia's war against Ukraine were analysed by O. Sytnyk (Sytnyk, 2017), L. Yakubova (Yakubova, 2022), V. Ilnytskyi, V. Starka, M. Haliv (Ilnytskyi, Starka & Haliv, 2022), etc. Historical, legal and political analysis of the events that testified that Russia was waging a hybrid war against Ukraine was carried out in the works by both scholars and documentary journalists: V. Bilotserkivskyi (Bilotserkivskyi, 2017), M. Bushyn, O. Hurdzhii (Bushyn & Hurdzhii, 2016), O. Zavadzka (Zavadzka, 2016), L. Chekalenko, S. Feduniak (Chekalenko & Feduniak, 2010), V. Losiev (Losiev, 2001), B. Butkevych (Butkevych, 2015), S. Zhukov (Zhukov, 2019), D. Kazanskyi (Kazanskyi, 2014), M. Kryhel and R. Khalilov (Kryhel & Khalilov, 2023), O. Shevchenko and A. Dorohan (Shevchenko & Dorohan, 2019), etc. The studies of certain aspects of the Russo-Ukrainian confrontation since the full-scale invasion have been conducted by M. Lazarovych (Lazarovych, 2017), A. Kharuk (Kharuk, 2022), V. Hrytsiuk and O. Lysenko (Hrytsiuk

& Lysenko 2023). P. Fedorchenko-Kutuiev, I. Pyrholenko, A. Khom'iak studied the democratic development capabilities of the post-war Ukrainian society in the context of existing geopolitical realities (Fedorchenko-Kutuiev, Pyholenko & Khom'iak, 2023). However, in the context of the development dynamics of a modern global, domestic, military and political situation, a domestic historical experience of the hybrid war with the Russian Federation requires a deeper study, with the aim of systematizing it and finding the ways of a collective resistance to this kind of aggression.

**The Results of the Research.** In the 70s and 80s of the previous century degradation and collapse of the pro-Soviet political regimes in the countries of Eastern Europe proved the inability of communist ideology to provide the basis for building a democratic society and significantly complicated the Soviet Union's ability to advance its geopolitical interests in the West. There is no doubt, these processes accelerated the already inevitable collapse of the USSR. Mass discontent of the population happened due to a low standard of living and social injustice caused by the corruption and crimes of the communist regime, dealt a devastating blow to the Kremlin's imperial ambitions. Russia, as the main ideological heir of the Soviet Union, after its collapse tried to take on the mission of a geopolitical leader, which seeks to renew and strengthen its influence on as many European territories as possible. However, under the conditions of the changing world, the development of economies and a related increase in the standard of living of the population of the European democracies, it became increasingly difficult for the Russian Federation to maintain not only geopolitical influence, but also national statehood. Russia realized the falsity of its chosen strategy of economic development, which would inevitably lead to the collapse of the state, and in an effort to preserve itself for as long as possible, Russia declared a messianic path of foreign policy. The focus of this policy was to "protect" the countries that were once part of the USSR from political, economic, and military expansion of the West. The above-mentioned policy was also intended to protect the national interests in the security sphere. This policy reflected the reluctance of the Russians to put up with the collapse of the Soviet empire and the loss of the vast territories (Dubniak, 2023, p. 60). At the same time, the political leadership of the Russian Federation cherished the hope that the fulfillment of a noble historical mission would unite the Russian citizens, make them forget about their own difficulties and troubles for a certain time, and at least temporarily save the Russian state from an inevitable self-destruction.

The termination of the USSR existence plunged the Russian Federation into a new reality, and the primary goal of its foreign policy became the preservation of the status quo of the metropolis for the former Soviet republics, for which all available means were used, preventing the latter from finally rejecting the Russian Federation and following the path of self-sufficient political and economic development. To a large extent, a narrow specialization of production in the USSR with centrally planned integration into a single all-Union national economic complex contributed to the solution of such goals. Such circumstances made it possible to raise issues on the development of mutually beneficial economic cooperation, creation of various political and economic blocs that would strengthen ties among the post-Soviet republics.

Russia, Ukraine and Belarus signed the Belovezha Accords on December 7–8, 1991, which declared the creation of the Commonwealth of Independent States (CIS) as a regional intergovernmental organization led by Russia, designed to ensure a painless withdrawal of the republics from the USSR. It was assumed that the CIS would not perform state functions

and would not have supranational powers. However, in reality, the CIS began to be used by Russia as an integration platform to bring together the systems of state administration of the CIS countries, support existing and create a new military potential. In the context of the Warsaw Pact Organization existence termination, the Russian Federation showed a serious interest in creating an alternative organization of collective security, to some extent opposed to NATO. Hence, on May 15, 1992, the Agreement on Collective Security was concluded in Tashkent. At the initiative of the Russian Federation, various programmes were also implemented on the CIS platform to strengthen the economic dependence of the former union republics on the centre (the CIS Free Trade Zone, the Interstate Bank of the CIS). In general, Russia's aggressive policy towards its CIS partners limited their opportunities significantly to build their own national statehood and was aimed at the development of supranational bodies, which turned the CIS into a state of a confederal or even federal system (Bilotserkivskiy, 2017, p. 514)

In addition to the means of economic and political pressure, in order to implement the strategic goals of the Russian policy regarding the preservation of influence in the CIS countries, the special services of the Russian Federation carried out destructive work to incite inter-ethnic and inter-national enmity in those countries in order to inspire local conflicts and create zones of military and political instability in their territories. For the most part, such conflicts ended up with the loss of the part of the territories (the self-proclaimed Transnistrian-Moldavian Republic, the Nagorno-Karabakh Republic, the Republic of Abkhazia, the Republic of South Ossetia) with the subsequent involvement of the Russian Federation in peacekeeping activities up to the introduction of peacekeeping missions, in which the military presence contributed to the growth of a political influence. Later similar scenarios were later used to destabilize the situation in the south and east of Ukraine. In 2014, the Russian special services activated the “Novorossia” project as a zone of wide instability under the patronage of the Russian Federation, which was supposed to cover fully or partially the territories of Kharkiv, Donetsk, Luhansk, Kherson, Mykolaiv and Odesa regions. However, due to the previous experience, gained through the Crimea annexation enabled the political leadership of Ukraine to prevent such a development of events (Bushyn & Hurdzhii, 2016, pp. 572–573) An alternative military and political project of the Russian Federation implemented in the east of Ukraine was the “Malorossia” project, the goal of which was the covert occupation of Donetsk and Luhansk regions within their administrative borders with the subsequent holding of a fake referendum and accession to the Russian Federation. The main bet in the implementation of this project was placed on the international enmity between the Russians and the Ukrainians, which was actually ignited and supported by the actions of the Russian special services. However, the Kremlin always denied its involvement in actions to destabilize the situation in Ukraine at the official level, which posed a direct threat to its territorial integrity and sovereignty and eventually led to an open war, the main goal of which was “the restoration of the former empire and subjugation of Ukraine” (Vardanian, 2023, p. 35).

Ukraine never became a signatory of the CIS Statute, which delegitimized its participation in the organization efficiently, after signing the agreement on its establishment. Contrary to this, Russia recognized Ukraine's membership in the CIS emphatically, even despite the fact that in 2014, after the annexation of the Crimea, a decision of the National Security Council was made, according to which Ukraine withdrew its membership officially. Later, on May 9, 2018, the President of Ukraine, P. Poroshenko, signed the Decree, which implemented the decision of the National Security Council on the final termination of Ukraine's participation

in the statutory bodies of the CIS. However, the Russian side ignored that fact, and on October 11, 2019, the Executive Committee of the CIS sent an invitation to President V. Zelensky for the CIS summit, but he did not attend it (Zhukov, 2019). Such intrigues of the Kremlin showed that the Soviet practice of conducting a subversive policy on an international scale was fully accepted by Russia in solving its own geopolitical goals.

The geographical location of Ukraine, in particular, access to the Black Sea basin and proximity to European countries, determined its stay in the Russian Federation zone of special interests. In this regard, the Russian Federation used various means of political and economic pressure, the goal of which was to weaken and destroy the economy of Ukraine, to make its political leadership dependent on the Russian Federation. Economic pressure with elements of fraud was applied to Ukraine immediately after leaving the USSR, when material assets abroad that were subject to distribution and were diverted by the Russian Federation to its own benefit. A similar situation occurred with the treasury of the CPSU and the assets of Oschadbank, funds from which were also appropriated by the Russian Federation (Chekalenko & Feduniak, 2010, pp. 152–153). In addition, there was always the opinion regarding the illegality of Ukraine's exit from the USSR in the highest political circles of Russia, therefore, from the first days of its independence, the state policy of the Russian Federation was aimed at weakening it, depriving it of economic independence, establishing a full political control over state life up to the annexation of certain territories. Immediately after the collapse of the USSR, the ruling circles of the Russian Federation declared territorial claims to the Crimea. In particular, as early as 1992, the decree of the Presidium of the Supreme Soviet of the USSR of 1954, according to which the Crimea was the part of the Ukrainian SSR, was recognized as illegal by Parliament of the Russian Federation (Losiev, 2001, p. 64). The fact of international recognition of Ukraine's borders did not affect Russia's intentions to reject it. Hence, the subsequent policy of the Russian Federation in relation to the Crimea was aimed at finding ways to annex it. The first attempts were made in 1992 – 1995, when Ukraine almost lost the Crimea due to the provocations of the pro-Kremlin Yu. Meshkov (Shevchenko & Dorohan, 2019). In 2003, another large-scale provocation occurred, when the Russian side began construction of a dam that was supposed to connect the coast of the Russian Federation with the Ukrainian island of Tuzla. Owing to a personal interference of the President of Ukraine, L. Kuchma, who interrupted a series of visits to Latin American countries, arrived at the scene of events and organized a demonstrative construction of defensive fortifications on the spit, the construction of the dam was stopped (Kryhel & Khalilov, 2023). However, at the official level, the Russian side never recognized the island of Tuzla as the Ukrainian territory, and Russia continued to try to separate the Crimea from Ukraine.

One of the objects of vulnerability, which enabled Russia to exert a continuous pressure on the economy and politics of Ukraine, was the shortage of energy resources. The vast majority of gas pipelines connecting Russia and Europe passed through the territory of Ukraine at the time of the collapse of the USSR. After the declaration of independence and separation from the USSR, Ukraine began to buy gas from Russia and take part in contracts for its supply to Europe. Given the growing shortage of fuel, the issue of gas procurement and transportation immediately became the subject of manipulation by the Russian Federation, a means of influencing not only the Ukrainian, but also European and international politics. Thus, back in 1993, under the conditions of hyperinflation of a payment system, the payments for gas in the US dollars, carried out at the request of the Russian side, led to a sharp increase in the debt of Ukraine under gas contracts and, as a result, a permanent economic weakening.



Taking advantage of these circumstances, the Russian Federation put forward a demand for the settlement of a part of the gas transportation system, which was unacceptable for Ukraine, because it put it even more economically and politically dependent on its partner. As repayment of the gas debt, Ukraine transferred to the Russian Federation eight TU-160 strategic bombers, three TU-95MS, six hundred Kh-22 cruise missiles, the corresponding strategic ground equipment, which significantly weakened its defense capability and military potential (Postanova Kabinetu Ministriv Ukrainy № 2032 vid 02.11.99 r.). In the future, Russia lobbied for the creation of the Unified Economic Space, which extended over the territory of the Russian Federation, Belarus, Kazakhstan, and Ukraine, (Угода про формування єдиного економічного простору від 19.09.2003 р.) and the joint use of the gas transportation system. Taking into account the existing political agreements, Ukraine paid for gas on the basis of barter, i.e. the payment was the transit of gas to Europe through the Ukrainian gas transport system. The existing agreements and “success” of the Ukrainian policy in the gas issue were largely determined by the loyalty of the Ukrainian authorities to the aggressive policy of the Kremlin, as well as, of course, a weak economic situation.

The significant success of the Russian Federation, which opened the possibility of waging a hybrid and later on the aggressive war against Ukraine, came during the term of office of the first President of Ukraine, L. Kravchuk. In 1993 the signing of the Massandriv agreements determined the future fate of the Black Sea Fleet and nuclear weapons stationed on the territory of Ukraine. In 1994 in Moscow, contrary to the one ratified by the Verkhovna Rada on November 18, 1993 of the START-1 Treaty, which provided for the gradual reduction of strategic nuclear weapons located on the territory of Ukraine, L. Kravchuk arbitrarily decided to sign the Tripartite Statement of the Presidents of Ukraine, the USA and Russia on the immediate export of all Ukrainian nuclear weapons to Russia (which ended on June 1, 1996), and without any specific security guarantees and documented financial compensations (Zavadzka, 2016, p. 35). On December 5, 1994, with the accession of Ukraine to the Treaty on the Non-Proliferation of Nuclear Weapons, the leaders of Ukraine, the United States, Russia, and the United Kingdom signed the Memorandum on Security Guarantees, according to which these countries undertook not to use weapons against territorial integrity or political independence of Ukraine, widely known as the “Budapest Memorandum” (Chekalenko & Feduniak, 2010, pp. 138–142) However, this document did not go through the process of ratification in the Russian Parliament, which served as a basis for manipulations by the Russian Federation concerning recognition of its legal capacity. The unfair division of the Black Sea Fleet, the principle of which was established by the Agreement dated 04.15.94 between Ukraine and the Russian Federation on the phased settlement of the problems of the Black Sea Fleet and the agreement between Ukraine and the Russian Federation on the parameters of the division of the Black Sea Fleet, ratified by the Law of Ukraine No. 547-XIV dated 03.24.99, created the basis for the annexation of the Crimea by Russia in 2014.

In the 1990s the main interest of the Russian elite was the preservation of Ukraine as a reliable neighbour and partner, therefore one of the tools of pressure on the Ukrainian politics, in addition to the price of gas and other natural resources, was efforts to establish control over the political life of the country, including over formation processes and activity of political parties, the course and results of elections to authorities at all levels, including the elections of the President of Ukraine. Such attempts became the most noticeable in 2004. After the “cassette scandal”, when the President of Ukraine L. Kuchma was publicly accused of involvement in the murder of a journalist H. Gongadze, against the background

of large-scale public protests, his ratings began to drop sharply, which ultimately led to early presidential elections. In order to strengthen the influence on the Ukrainian politics during the 2004 presidential elections, Russia in the person of President Vladimir Putin supported the pro-Russian candidate of Ukraine V. Yanukovych publicly. However, during the election process, large-scale falsifications and the involvement of the Central Election Commission (CEC) headed by S. Kivalov were revealed, which did not publish the final voting results for ten days. It also turned out that the work of the CEC's computer network was subjected to external interference, that is why, the election results were called into question, as they were strikingly different from the exit polls, which confirmed the victory of the pro-European leader V. Yushchenko. The tampering and falsification of the results of the popular vote, especially in the East of the country, where the majority of the polling stations were controlled by the Party of Regions, which supported V. Yanukovych, pointed at the Russian trail. Outraged by this state of affairs, citizens of Ukraine went on a mass protest that lasted from November 21 to December 8, 2004, and given the symbols used by the participants, it was called the "Orange Revolution". In response, the supporters of V. Yanukovych took a course towards separatism and the division of the country. Held in Severodonetsk on the initiative of the leaders of Donetsk, Luhansk and Kharkiv regions, the "Congress of Deputies of All Levels" called for the proclamation of the South-Eastern Autonomous Republic. At the same time, in the western and central regions of the country, local councils made decisions on recognizing V. Yushchenko as the President of Ukraine. The political crisis was resolved, V. Yushchenko was elected President of Ukraine following the results of the repeated second round (Bushyn & Hurdzhii, 2016, pp. 554–557). However, these events gave the start to Russia's shake-up of the political situation in the country, the result of which was the growth of separatist sentiments of the population in the south and east of the country.

After the shameful defeat in the presidential elections of the pro-Russian candidate V. Yanukovych and the coming to power of V. Yushchenko, one of the main means of the Russian influence on the Ukrainian politics, as before, remained the "gas issue". In 2005 gas contracts with the Russian Federation were renegotiated, but the price of rose to the European level – 250 dollars/1000m<sup>3</sup>. At the same time, the Russian Federation launched a powerful information campaign to discredit Ukraine as a transitor for gas supplies to Europe, creating a negative international image to it. The economically unjustified gas price, which acted as a means of pressure and manipulation on the part of the Russian Federation, forced Ukraine to search for alternative sources of gas supply. However, Russia did everything to hinder Ukraine. Thus, in February of 2006, the Russian Federation provoked the "Turkmen crisis", when Ukraine's attempts to conclude contracts for the supply of Turkmen gas were blocked. In 2008 – 2009 one more gas conflict took place, as a result of which the gas contracts with Russia were renegotiated on extortionate terms for Ukraine, which were based on the "take or pay" formula, and fines for undersupply of fuel reached up to 300% in winter and 150% in summer (Kushniruk, 2011).

The political forces that came to power in Ukraine after the Orange Revolution, led by President V. Yushchenko, announced a course for European integration and joining NATO. However, numerous scandals, the struggle for power within the "orange" team, including the open conflict between President V. Yushchenko and the Prime Minister of Ukraine Yu. Tymoshenko, led to the collapse of the coalition of democratic forces. The gas agreements, around which the main disputes were raging, had a significant impact on the destabilization of the situation in politics and the state. The increase in gas prices undermined the already very

shaky economy of the state and placed an inordinate burden on the shoulders of its population. Russia clearly stated its position on its reluctance to make concessions and agreements with the Ukrainian authorities, which tried to enter the European integration path of its development and, with the help of politicians oriented towards it, shook the situation from the inside, which ultimately resulted in the disillusionment of the Ukrainians with the post-Maidan leaders of the Orange Revolution and brought pro-Russian political forces to power.

In 2010, the next presidential elections in Ukraine were won by V. Yanukovich, whose candidacy, like many other top leaders of the state in the security and economic spheres, was supported by the Russian Federation. When he came to power, flexibility was demonstrated in the formulation of the gas price, however, exclusively on the terms of Russia. Therefore, on April 21, 2010 the Kharkiv Agreements were signed, ratified by the Verkhovna Rada and the State Duma of the Russian Federation on April 27, 2010, where in exchange for a 30% discount due to the cancellation of customs duties, it was agreed to extend the term of lease contracts for the base of the Black Sea Fleet of the Russian Federation in the city of Sevastopol until 2042. The presence of the Russian Navy on the territory of the Crimea created a foundation for the work of the special services of the Russian Federation to activate and increase the pro-Russian attitudes of the population, increasing the total number of supporters of the idea of the Crimea becoming part of Russia.

The change in the official course of the state from the European direction to the development of a strategic partnership with the Russian Federation, announced by the government of V. Yanukovich, provoked opposition by the Ukrainian society and led to the Revolution of Dignity, during which peaceful protesters were shot in the centre of Kyiv, in which, according to the official version, there was also the Russian trace, which was openly stated by the head of the Security Service of Ukraine Valentyn Nalyvaichenko and the fifth President of Ukraine Petro Poroshenko (Butkevych, 2015). In view of the uncontrolled and threatening development of the events, V. Yanukovich and his team hastily evacuated from Kyiv, later settling in uncontrolled Ukrainian territories and in Russia.

The Revolution of Dignity finally imprinted the path of historical development chosen by the people of Ukraine, which directly became oriented towards European integration and joining NATO, which was even included in the text of the Constitution, Part 2 of Art. 102 of which defined the President of Ukraine as the guarantor of the implementation of the state's strategic course towards a full membership of Ukraine in the European Union and the North Atlantic Treaty Organization. However, these events gave a start to spinning the flywheel of Russia's hybrid aggression against Ukraine, led to the annexation of the Crimea and inspired the conflict in Donbas.

In view of the further circumstances of the state and political life development of Ukraine, gas pressure on it from Russia began to grow. In 2014 on the initiative of the Russian side, Gazprom cancelled all obligations for 30% discounts, allegedly for non-fulfillment of the terms of the contract, which later became the subject of consideration by the Stockholm Arbitration, according to which in 2015 "Gazprom" had to pay compensation to the Ukrainian side. In 2016 – 2021 the construction of the "Nord Stream-2" and "Turk Stream" pipelines is underway, the hearings of cases in Stockholm arbitration continue, but already according to the "Gazprom's" lawsuits against "Naftogaz". At the end of 2021, attempts were made to resolve the issue of putting the "Nord Stream-2" gas pipeline into operation, which is accompanied by the use by the Russian Federation of all available levers of a political influence, including blackmail and destabilization of the situation in the countries of the

European Union due to the creation of an energy and migration crisis, pressure on the United States, where threats to use a force scenario in Ukraine became a bargaining chip.

Taking advantage of the situation of government instability in Ukraine after the Euromaidan, the Russian troops deployed at the end of February of 2014 to the Crimea and the Crimean bases of the Black Sea Fleet of the Russian Federation in military uniforms without any identification marks occupied the Crimean peninsula. Also, the armed formations of the Russian “cossacks”, who called themselves “the Crimea self-defense”, were created from among the pro-Russian population, misinformed about the events taking place in the country at the time. On March 16, 2014, a referendum on the status of the peninsula was held on the territory of the Crimea and the city of Sevastopol under the control of the Russian occupiers and local collaborators, as a result of which the Russian Federation included the Crimea in its composition. However, neither Ukraine, nor the EU, nor the USA recognized the results of the illegal vote, which started the long-term occupation of the Crimea by Russia.

Similar events also developed in Donbas at the time rapidly. Taking into consideration the existing realities, the territories of Luhansk and Donetsk regions were predominantly inhabited by the Russian-speaking population. The commonality of their borders with the Russian Federation and the absence of strict regime measures regarding their crossing both from one side and from the other side led to a significant labour migration, the widespread settlement of these territories by ethnic Russians, the expansion of close interpersonal ties, including family ones, between residents of Donetsk and Luhansk regions and citizens of the Russian Federation. Given these circumstances, the majority of the population of these regions were pro-Russian in terms of choosing the main directions of the state policy, which was confirmed by the results of local referendums held in Donetsk and Luhansk regions back in 1994. Four questions were submitted to the regional consultative survey: on the federalization of Ukraine, Russian as the second state language, on the status of the Russian language on an equal footing with Ukrainian in administration, education and science in Donetsk and Luhansk regions, and on a deeper integration into the SND. About 80% of voters answered all these questions in the affirmative (Kazanskyi, 2014). Considering these circumstances, since Ukraine’s declaration of independence, Russia has conducted an information policy regarding the population of the Ukrainian Donbas, aimed at strengthening ties with the population of this region. The loyalty of part of the population of the Ukrainian Donbas to Russia was always used by it as a means of influencing the Ukrainian politics, was a card in speculations and manipulations during the holding of various levels of elections, a kind of traffic that brought pro-Russian politicians to power. The coming to power of pro-European-oriented political forces, which was the result of the Revolution of Dignity in 2014, caused some concern among the population of these regions about the future prospects of the country’s political life. Taking advantage of this situation, special information operations were systematically conducted by the special services of the Russian Federation through the mass media and influence agencies directed at the population of Donbas with the aim of intimidating them by the Ukrainian nationalists, who allegedly came to power in Kyiv as a result of a coup d’état, as they called the Revolution of Dignity there, and wanted to deal with the “Muscovites” who invaded the east of the Ukrainian state. In connection with this, the idea of creating a people’s militia began to be promoted, stimulated by the impossibility of official employment of the civilian population and their legal monetary earnings (stopping of industrial production, flooding of mines, etc.). In general, the aggression of the Russian Federation took place in a disguised form – at the initial stage, the Russian servicemen acted

under the guise of “militias”, “cossacks”, “volunteers”, later – as part of armed formations of puppet state entities, where, according to the legend of the Russian propaganda, local “tractor drivers”, “miners”, “farmers” obtained weapons and military equipment hidden in the mines and seized from the “Kyiv junta” (Martyniuk, 2018, p. 13).

Powerful disinformation campaigns, organizational and resource support in the creation of illegal armed formations by the special services of the Russian Federation, as well as participation in combat operations of regular units of the Russian armed forces under the banner of the Donbas militias made it possible to invade part of the Ukrainian territories, to create puppet quasi-state entities that were actually financially supported and under the external management of the Russian Federation (LPR, DPR), which resulted in a long-term military conflict in the East of the country. With the direct participation of the Russian Federation, not only measures were taken to simulate the events of the civil war in Donbas, but also attempts were made to legitimize the LPR and DPR as independent state entities, where one of the mechanisms was the creation of “representative centres” in foreign countries and the involvement of citizens of such countries in their activities, with for the purpose of promoting the Russian vision of the problems of the LPR/DPR functioning.

Diplomatic efforts of Ukraine aimed at settling the Ukrainian-Russian conflict were realized in the form of signing the Minsk Protocol following the results of the tripartite contact group meeting on September 5, 2014. (“Minsk-1”), the main achievement of which was the establishment of the demarcation line in the conflict area and the implementation of a ceasefire regime. However, the terms of this protocol were actually immediately violated by the opposite side, and the line of demarcation was broken during the Russian operation to invade Debaltsevo, which entailed a new round of escalation of the conflict, which was accompanied by numerous human losses on both sides. It is quite obvious that the Russian side’s violation of the terms of “Minsk-1” was aimed at the subsequent negotiation of more favourable terms of the truce. As a result of these efforts, on January 12, 2015, a new agreement was concluded on the settlement of the conflict in Donbas and the de-occupation of Ukrainian territories, the main point of which is to grant the status of a broad autonomy to Luhansk and Donetsk regions, which actually provided for a change in the state and political system of Ukraine and required amendments to the Constitution. At the time, Donbas was used by the Kremlin as a “bargaining coin” in negotiations with international partners, primarily Germany and France, which participated in the settlement of the conflict. During the Minsk process, the Russian side advanced the ideas of federalization of Ukraine, which in practice meant the dismemberment of our state (Hrytsiuk & Lysenko, 2023, p. 16).

The leading condition of “Minsk-2” was the holding of local elections before the borders were closed and these territories came under the jurisdiction of Ukraine, as well as a full amnesty to members of armed military formations, regardless of whether they took part in the hostilities or whether they killed, and there were human casualties victims. Of course, the conditions of “Minsk-2” were humiliating and unacceptable for Ukraine as a subject of world and European politics, and also went against the provisions of national legislation, which provided for the inevitability of criminal punishment. In addition, the fulfillment of its conditions would create even greater opportunities for the Russian Federation to influence the foreign and domestic politics of Ukraine, since the political leadership of the Luhansk and Donetsk autonomies, formed under the conditions of Russian influence, would focus on the interests of its curators when making important state decisions. Under such conditions, the so-called DPR and LPR would remain the zone of a permanent conflict, which, according

to the decision of the Russian Federation, could turn into a zone of full-scale hostilities in a matter of hours.

Ukraine's non-fulfillment of the "Minsk-2" conditions was the formal basis for Russian President V. Putin's announcement of a "special military operation" and the start of the war against Ukraine, which has become the most aggressive armed conflict in Europe since World War II (Kharuk, 2022, p. 139) The open Russian aggression received a stiff resistance of the Ukrainian people and further consolidated the Ukrainian society in favour of choosing the European integration course of the state's development (Fedorchenko-Kutuiev, Pyholenko & Khom'iak, 2023, p. 156)

As the British general Adrian Bradshaw noted: "any aggression should not go unanswered, and the answer to "hybrid methods" should be "hybrid deterrence" (Beale, 2017). Considering the fact that the methods of conducting hybrid or "unconventional" warfare are covert, identifying the threats associated with them is quite problematic and requires the use of professional approaches based on the coordination of the activities of intelligence agencies, special services and bodies of state power and management within the country, a close cooperation with foreign partner and international structures, in order to create opportunities for the exchange of analytical information, detection and disclosure of the enemy's intentions, neutralization of a destructive influence of enemy's malicious activities. The aggressive policy of the Russian Federation has long been the object of concern of the countries of the European Union and the member states of NATO, which, taking into account the ineffectiveness of the political and economic deterrence measures applied to it, deployed their own collective security system to counter hybrid threats. In particular, on December 10, 2019, a resolution was adopted in Brussels that defined the main directions of countering hybrid threats and increasing the resilience of member states to such challenges, which is part of the EU Strategic Agenda for 2019 – 2024. In order to expand cooperation between the EU and NATO countries in the field of countering hybrid threats according to the memorandum concluded in 2017 between the USA, Great Britain, France, Germany, Sweden, Poland, Finland, Latvia and Lithuania, the European Centre for Countering Hybrid Threats was established in Helsinki, with the aim the functioning of which became research work and information exchange regarding the existence of certain hybrid threats that pose a danger to participating countries, as well as studying and predicting new potential scenarios of hybrid warfare. The results of the conducted research, the information collected and processed by it are used by the partner countries in the development of their own strategies for detecting, preventing and overcoming hybrid threats.

Ukraine, as a victim of hybrid aggression, is directly interested in integration into the international infrastructure for countering hybrid threats. The idea of creating a national body that will be responsible for interdepartmental coordination to counter hybrid threats has already been discussed in publications (Danyliuk, 2021, pp. 42–43). High-level strategic advisers from the Defense Reform Advisory Board also supported the idea of creating a centre for countering hybrid threats in Ukraine, which should become a platform for international cooperation and exchange of experience and should be based on the government's active cooperation with NATO to build national resilience. However, despite the political statements, to date the Ukrainian side has not taken any measures aimed at creating such a structure that would ensure coordination and countermeasures against hybrid aggression of the Russian Federation both inside the country and outside, in cooperation with the partner countries, at the national level, which are part of the NATO bloc. Declaring a political course for

rapprochement with the European Union, applying for membership in NATO, Ukraine should at least now take real political steps that allow to clearly define its geopolitical orientation and the direction of the development course, because the inhibition of these processes leads to irreparable losses.

**The Conclusions.** The hybrid war of the Russian Federation against Ukraine began from the time of its declaration of independence and the creation of a sovereign state, intensified after the Revolution of Dignity, as a result of the mass expression of the will of the people of Ukraine regarding the choice of the geopolitical path of the development of their country, and turned into an open war in 2022.

Taking into account the events related to the Russian invasion of 2022, it can be argued that, in addition to Ukraine, victims of the hybrid influence of the Russian Federation are also other states of the post-Soviet camp, in particular Belarus, from whose territory the Russian troops entered the territory of Ukraine in 2022, and there was missile shelling and drone attacks. Moldova is also a victim of the hybrid war of the Russian Federation, within which the political situation is currently actively shaking up with the aim of removing the current political leaders from power and replacing them with the pro-Russian ones, simultaneously with threats about the participation of the Russian troops in the event of an escalation of the conflict with the Transnistrian Moldavian Republic. Mass protests in Georgia, which recently have taken place due to the adoption of the law on foreign agents by the Georgian parliament, against the background of a gradual change in the country's political course towards the collapse of democracy and rapprochement with Russia, are also a direct sign of the Russian hybrid influence. Finally, the results of the vote of the UN General Assembly on February 23, 2023 regarding the resolution calling on Russia to stop the hostilities and withdraw its troops from Ukraine, and among the countries that abstained were Armenia, Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan, show that the front of the hybrid war waged by the Russian Federation is extremely broad. The results of Russia's hybrid influence on the state life and politics of individual countries pose a threat to international security and destroy the world legal order. Taking the above mentioned into account, the issues of the existing directions of deployment of hybrid war, the main objects of vulnerabilities of hybrid attacks, the system of markers that determine them, require *further scientific research*, with the aim of designing and building a system of fuses that will allow to localize and minimize the destructive consequences of a hybrid influence in the near and distant future for both Ukraine and its partners.

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**LOCAL SELF-GOVERNMENT IN UKRAINE IN THE 1990s:  
THE SOVIET MODEL REJECTION, REFORM FEATURES**

**Abstract.** The purpose of the research is to elucidate a local self-government formation in Ukraine in the 1990s, to find out the issues of the Soviet model governance transformation into the European-style democratic structures. **The methodology of the research** is based on the principles of systematicity, specific historical approach, historical systemic and historical typological methods. The above-mentioned applied methods made it possible to single out the specifics of Ukraine's sovereignty formation, development and power structures democratization. The analysis of the “local self-government” category has been carried out using a logical method, which made it possible to reveal the objective patterns of this phenomenon development. In addition, there have been applied the following methods: general scientific methods of analysis and synthesis, comparative, structural functional, and generalization. **The Scientific Novelty.** The processes of a local self-government formation in Ukraine in the 1990s have been studied for the first time, and transformation issues of the Soviet model of governance into the European-style democratic structures have been revealed. **The Conclusions.** The study on a local

self-government institutionalization has proved the relationship with the processes of de-Sovietization and decentralization of public power in Ukraine at the transitional stage of the state formation. In the article there has been traced the relationship between the institution of a local self-government formation in Ukraine and the power vertical de-Sovietization processes. Changes in local self-government began during the last years of the USSR and Ukrainian SSR existence. However, a full development of municipal democracy took place after the adoption of Declaration on Independence of Ukraine. Local state administrations were established, which aimed at unifying the management system under the conditions of economic crisis and significant political disagreements between the President and Parliament. The conclusion of the Constitutional Treaty was an attempt to overcome the political crisis and balance attempts to centralize power by the President. The document laid the foundations for the constitutional approval of a local self-government. The adoption of the Constitution of Ukraine and relevant legislation in the following years was decisive for the further development of democracy and local self-government development, which basically combined democratic postulates and post-socialist centrism characteristic of this period.

**Key words:** local self-government, institution of local self-government, local elections, local self-government bodies, democratization.

### МІСЦЕВЕ САМОВРЯДУВАННЯ В УКРАЇНІ (1990-ті рр.): ВІДХІД ВІД РАДЯНСЬКОЇ МОДЕЛІ, ОСОБЛИВОСТІ РЕФОРМУВАННЯ

**Анотація. Мета дослідження** – розкрити становлення місцевого самоврядування в Україні у 1990-х рр., з'ясувати проблеми трансформації моделі радянського управління у демократичні структури європейського зразка. **Методологія дослідження** ґрунтується на принципах системності, конкретно-історичного підходу, історико-системного та історико-типологічного методів. Використання цих методів уможливило виокремлення специфіки становлення та розвитку суверенізації України, а також демократизації владних структур. Аналіз категорії “місцеве самоврядування” здійснювався з використанням логічного методу, який дав змогу виявити об'єктивні закономірності розвитку цього явища. Також використано загальнонаукові методи аналізу і синтезу, порівняльний, структурно-функціональний, узагальнення. **Наукова новизна.** Уперше досліджуються процеси становлення місцевого самоврядування в Україні у 1990-х рр., розкриваються проблеми трансформації моделі радянського управління у демократичні структури європейського зразка. **Висновки.** Вивчення інституціоналізації місцевого самоврядування засвідчило взаємозв'язок з процесами дерадянзації та децентралізації публічної влади в Україні на перехідному етапі державотворення. У статті простежено взаємозв'язок становлення інституту місцевого самоврядування в Україні і процесів дерадянзації владної вертикалі. Зміни місцевого самоврядування розпочалися в останні роки існування СРСР та УРСР відповідно. Однак у повному обсязі розвиток муніципальної демократії відбувся після прийняття Декларації про незалежність України. З'явилися місцеві державні адміністрації, які мали на меті об'єднати систему управління в умовах економічної кризи та суттєвих політичних розбіжностей між Президентом і Парламентом. Спробою подолати політичну кризу та зрівноважити спроби централізації влади Президентом було укладення Конституційного договору. Документ заклав основи для конституційного утвердження місцевого самоврядування. Визначальним для подальшого розвитку демократії та розбудови місцевого самоврядування стало прийняття Конституції України і профільного законодавства у наступні роки, що, по-суті, поєднувало демократичні постулати та постсоціалістичний центризм, характерний для цього періоду. Однак адміністративно-територіальні одиниці, незважаючи на задекларовані широкі повноваження, не мали до кінця визначених важелів впливу на місцях, особливо щодо розв'язання соціально-економічних проблем.

**Ключові слова:** місцеве самоврядування, інститут місцевого самоврядування, місцеві вибори, органи місцевого самоврядування, демократизація.

**The Problem Statement.** A local self-government is one of the most important tools in a civil society. The main goal of this institution is territorial communities formation,

which directly and through representative bodies of a local self-government carry out effective management of affairs in the interests of a local community. The Soviet vertical was transformed gradually into a more modern system of authorities from the end of the 1980s. The process of a local self-government institutionalization took place in Ukraine, as an already independent state, which was inextricably linked with the socio-political context of state formation in the 1990s.

**The Review of Recent Researches and Publications.** The socio-political context of the era of Perestroika and the first years of independence of Ukraine is traced in a number of studies in detail. Numerous scholars covered the issues on the Soviet vertical of power transformation comprehensively, in particular the researches by the following historians: S. Kulchytskyi (Kulchytskyi, 2013), Yu. Shapoval (Shapoval, 2001), S. Plokyh (Plokyh, 2019). The following scholars A. Tkachuk were among the first to carry out a thorough analysis of the global and Ukrainian experience of changing a local self-government (Tkachuk, Ahranoff, Braun, 1997), B. Andresiuk (Andresiuk, 1997), T. Kuzio (Kuzio, 1998), Yu. Shemshuchenko (Shemshuchenko, 2005). Many Ukrainian scholars studied the process of building a democratic society through the prism of a local self-government, among them there were the researches by M. Baimuratov (Baimuratov, 1996, pp. 95–110; Baimuratov, 2001, pp. 115–150), O. Batanov (Batanov, 2001; Batanov, 2002, pp. 21–30), V. Kravchenko (Bilenchuk, Kravchenko, Pidmohylnyi, 2000), V. Zablotskyi (Zablotskyi, 2013). A related aspect of the research is the analysis of the European experience of implementing decentralization reform, in particular the studies by: M. Dolishny (Dolishny, 2006), O. Boryslavska (Boryslavska, Zaverukha, Shkolyk, etc., 2012), N. Kaminska (Kaminska, 2014), V. Barvinenko, N. Mishyna (Barvinenko & Mishyna, 2023, pp. 31–36). Foreign scholars also dealt with the establishment of democracy and local self-government systems in Central and Eastern Europe in the 1990s and in Ukraine in particular: A. Coulson (Coulson & Campbell, 2007) and A. Campbell (Campbell, 1995, pp. 115–127), T. L. Brown (Brown, 2000; Brown, 2001).

**The purpose of the research** is to elucidate a local self-government formation in Ukraine in the 1990s, to find out the issues of the Soviet model governance transformation into the European-style democratic structures.

**The Results of the Research.** Due to the process of Perestroika, the reforms of a local self-government began only under partial democratic changes in the USSR and Ukrainian SSR (Yevsieieva & Kryvchyk, 2019, p. 14). At the end of 1988, the constitutional reform was approved, and at the end of October of 1989, the law “On Elections of People’s Deputies” was adopted. Parliamentary elections of the Ukrainian SSR were held in March of 1990 (the last elections to the Verkhovna Rada of the Ukrainian SSR and at the same time the first “partially alternative elections to the Congress of People’s Deputies”) (Kruhliak, 2020, p. 9). On April 9, 1990, the Verkhovna Rada of the USSR adopted the law “On General Principles of Local Self-Government and Local Economy in the USSR”, according to this law, the formulation of a local self-government was presented for the first time in the works as “self-organization of citizens for the purpose of solving directly or through bodies elected by them, all issues of local importance, based on the interests of population and the characteristics of administrative territorial units, on the basis of laws and corresponding material and financial base” (Zakon SRSR, 1990b).

The first so-called democratic elections of 1990 changed the political composition of Parliament partly. The opposition forces did not win a complete victory over the communists, but they witnessed the formation of a new centre of power: for the first time, new representatives

entered Parliament and local councils (Kruhliak, 2020, pp. 60–61). Relations in the councils at different levels were regulated by the resolution of the Presidium of the Supreme Soviet of the USSR “On Model Regulations, on Chairmen and Presidiums of Local Councils of People’s Deputies” issued on October 20, 1989 and Law of the USSR “On General Principles of Local Self-Government and Local Economy in the USSR” issued on April 9, 1990. Local Councils elected the Head of the Executive Committee, who had the authority of the Chief official of the administrative territorial unit (Moroz, 2017, p. 244).

“Declaration on State Sovereignty” of July 16, 1990 was the defining document for the creation of a new management system. For the first time it recognized the legal personality of Ukraine and its people, because all power belongs to people and is exercised “directly and through the system of state authorities and local self-government” (Yevsieieva & Kryvchuk, 2019, p. 14). It should be noted that the main issues are to be considered in more detail. In the second part it was emphasized, in particular, that people’s power in Ukraine is implemented based on the Constitution, mainly through deputies of local councils of the Ukrainian SSR. At the same time, it was enshrined in part five of the Ukrainian SSR that there was the right to choose independently “the administrative territorial structure of the Republic and the order of the national administrative units formation”. In the following part there is described economic independence of the Ukrainian SSR and a local self-government: “Enterprises, institutions, organizations and production units located on the territory of the Ukrainian SSR pay fees for the use of land, other natural and labour resources, deductions from foreign exchange earnings, and also pay taxes to local budgets” (Deklaratsiia, 1990). Hence, there was envisaged the financial base creation to a local self-government owing to taxes payment (Kruhliak, 2020, p. 69).

The continuation of the Ukrainian SSR sovereignization process was the adoption of Law “On Economic Independence of the Ukrainian SSR” issued on August 3, 1990. According to Law the Ukrainian SSR “determines the economic status and strategy of socio-economic development in the interests of people of Ukraine independently”. The main principles of the economic independence of the Ukrainian SSR were based on the “property of people of the Republic to its national wealth and national income; diversity and equality of forms of ownership and their state protection”. But the most important thing was proclaimed “decentralization of property and denationalization of economy; full economic independence and freedom of entrepreneurship” (Zakon SRSR, 1990a). The above-mentioned law outlined the basis for the economic independence of a local self-government essentially, but it had a more declarative nature initially, because at the time Ukraine was still part of the USSR (Kruhliak, 2020, pp. 70–71).

There were several groups in the Ukrainian Parliament in 1990: the democratic opposition, which was aimed at independence, and the pro-government majority, part of which supported the autonomist sentiments, i.e. they advocated strengthening autonomy, but within the USSR. In June of 1990, Volodymyr Ivashko requested to be removed from the post of the First Secretary of the Central Committee. The XXVIII Congress of the Communist Party of Ukraine approved his request. Stanislav Hurenko was elected as the First Secretary of the Central Committee. Leonid Kravchuk was appointed the Speaker of the Verkhovna Rada of the Ukrainian SSR in July of 1990 (Kulchytskyi, 2013, p. 336). The “Soviet party local nomenclature” stopped relying on Moscow’s support due to the political struggle intensification in Russia, the strengthening of the “Democratic Forces and Nomenklatura Officials” block, led by Boris Yeltsyn. Hence, according to the scholar, Stanislav Kulchytskyi,

“the sovereign-communists began to increase among the nomenclature members of Ukraine. They considered the figures of the Narodnyi Rykh (People’s Movement) and other opposition deputies of the Verkhovna Rada not as opponents, but as situational allies regarding the issue of the Republic’s sovereignty” (Kulchytskyi, 2013, p. 337).

The main issue that remained undisputed was the need for further changes to the Soviet model of state and local governance. The above-mentioned need was not solely based on economic needs or the strengthening of local government structures. It was also fueled by individual aspirations of local council heads to gain some independence from the apparatus controlled by Moscow, especially since a significant number of them lost the elections (Kruhliak, 2020, p. 71).

The next important steps were to settle the situation at local administrations during the preparation of Law “On Local Councils of People’s Deputies of the Ukrainian SSR and Local Self-Government”, adopted at Session II of the Verkhovna Rada of the Ukrainian SSR of the twelfth convocation on December 7, 1990 (Kruhliak, 2020, pp. 71–72). The principles of a local self-government were defined in this law for the first time. The preamble stated, in particular, the following: “local self-government in the Ukrainian SSR is a territorial self-organization of citizens to solve all issues of a local life independently, directly (Zakon URSR, 1990b) or through the state and public bodies they choose, based on the interests of population, based on the laws of the Ukrainian SSR and their own financial economic base” (Law of the Ukrainian SSR “On Local Councils of People’s Deputies of the Ukrainian SSR and Local Self-Government”, 1990). According to the legal principles, local self-government was carried out within the relevant administrative territorial units of the Ukrainian SSR. The territorial basis is a village council, a settlement council, a town council, a district council, and a region council. According to Article 2, Part 2, the Council of People’s Deputies of all territorial levels and their bodies (Committees, Councils of micro-districts, residential complexes, etc.) are state bodies of the local self-government and represent the interests of citizens living in these territories. It should be emphasized that in Part 3 it is determined that the place of self-government is implemented on the principles of “people’s rule, legality and autonomy and independence of the Council of People’s Deputies within the limits of its powers in solving issues of local importance... self-financing, optimal decentralization”.

The Ukrainian scholar, Volodymyr Zablotskyi studied state-building processes and self-government development in Ukraine, noted that this law contributed to building the foundations of a democratic governance system in Ukraine and becoming one of the first states among the Soviet republics on the way to democratic transformations (Zablotskyi, 2013, pp. 179–180).

It should also be noted that, in addition to innovative provisions, the above-mentioned law included certain contradictions that resulted in attempts to combine the norms of the 1978 Constitution and the Soviet legislation with the need for rapid changes. Although the law emphasizes self-government, it also represented a dualistic theory of a local self-government, hence, it considered “the local Councils as both local self-government bodies and state authorities”. A lawyer Nataliya Kaminska noted the following that the abolition of such a dual subordination led “to violation of established management relations and a systemic crisis of an executive power in the state” (Kruhliak, 2020, p. 72).

The issue on financial and economic support was the next step for the administrative bodies network creation in the Ukrainian Republic. On December 5, 1990, Law of the Ukrainian SSR “On Budgetary System of the Ukrainian SSR” was adopted, which regulated

the issue of local budgets formation and their filling. Furthermore, the autonomous status of local self-government bodies relative to higher bodies was also emphasized. According to Article 11, “Local budgets provide necessary funds for the financing of economic and social development measures implemented by local state authorities and state administration bodies”. It is also worth noting that after the entry into force of this law, the interference of the Councils of higher levels and their executive bodies in the “the process of drawing up, approving and executing the budget” was not allowed (Zakon URSR, 1990a).

A vertical development of power, including the system of a local self-government, carried on after Declaration on Ukraine’s independence. The “Perestroika” reforms, which did not ensure the appearance of functional council power, the problem of re-subordination of the power system and economy brought the issue of changes in legislation to the fore.

On the initiative of the President of Ukraine, Leonid Kravchuk, Law of Ukraine “On Representative of the President of Ukraine” was adopted on March 5, 1992. The Institute of Representatives of the President was introduced, which became the highest official of the state executive power in the region and district. The Institute of Representatives of the President managed the local state administration, monitored compliance with legislation and the Constitution, was responsible for the execution of district and regional budgets (Zakon URSR, 1990a; Moroz, 2017, p. 244). The representatives of the President were authorized to create departments, administrations, other services of the local state administration, their heads, but did not have the authority to appoint heads of “the local bodies of ministries, state committees” (Zakon Ukrainy, 1992). However, Parliament did not give them the right to cancel the decisions of executive committees of local councils, even if they contradicted the law. Hence, there was an imposition of powers between local state administrations and local self-government bodies, which, as a result, led to a number of misunderstandings between the President’s representatives and the heads of the local councils (Steshenko, Verthele & Kurtish, 2021, p. 72).

A new version of the law “On Local Councils of People’s Deputies of the Ukrainian SSR and Local Self-Government” was adopted on March 26, 1992. Executive committees were liquidated in the councils of People’s Deputies, so in essence they became purely representative bodies, it was envisaged that part of the powers would be transferred from the councils to representative of the President. According to a scholar Andrii Nikonchuk, a new version of the law helped to stabilize the mechanisms of state administration, but there was no communication at a proper level between local state administrations and the Government in the future (Nikonchuk, 2011, p. 51).

The law on the Representative of the President and a new version of the law “On Local Councils of People’s Deputies...” became a significant step in the development of a European-style democratic system of a local self-government formally. However, according to researchers H. Yevsieieva and H. Kryvchyk, the above-mentioned changes were rather declarative in nature, and in fact became a return to the Soviet model. The main management powers were concentrated, albeit not in the Communist Party bodies, but in “the representatives of the President and their apparatuses” eventually. The Ukrainian leaders did not have such ceremonial and controlling functions as the prefects and commissioners in France, or the government commissioner in Italy (Yevsieieva & Kryvchyk, 2019, p. 15). Alla Bortnikova, a scholar of a local self-government history also expressed the thesis that the development of such a local government apparatus led by the representatives of the President of Ukraine resulted in the emergence of a rigid vertical of power, which was subordinate to the President of Ukraine (Bortnikova, 2018, p. 11).

There were held parliamentary and presidential elections early against the backdrop of a social and political crisis in the country. The Verkhovna Rada adopted the law “On Formation



of Local Authorities and Self-Government” on February 3, 1994, which, after the elections of deputies, heads of village, settlement, town, city, district and regional councils, abolished the institution of the President’s representatives (Kruhliak, 2020, p. 78). Heads of councils at all levels were to be elected by population of a certain territory, powers of state administrations in districts and regions passed to restored executive committees (Nikonchuk, 2011, p. 51).

The issue of financing a local self-government and division of local and state budgets was acute during the period of 1992–1994. In July of 1994, there was the first reading of the draft law “On Local Councils of People’s Deputies” after the presidential and parliamentary elections, according to which the institution of a local state administration was liquidated, instead a local self-government was restored, the bodies of which were directly subordinated to the Cabinet of Ministers of Ukraine, the executive bodies of higher than those of rank, but only in matters of implementation of delegated powers (Steshenko, Vertheel & Kurtish, 2021, p. 72). It should be highlighted that in this draft law, in fact, further mechanisms for regulating the issue of powers and activities of a local self-government were not developed, but on the contrary, the provisions on “the territorial collectives of communities, on the principles of organizing relations between local self-government bodies on a “vertical” basis were removed. However, as a result of by-elections and the arrival of centrist constituencies in Parliament, this bill was not adopted (Kruhliak, 2020, pp. 79–80).

Leonid Kuchma, the newly elected President, was faced with the urgent need to reform the state power system of Ukraine. L. Kuchma represented himself as a supporter of the presidential parliamentary form of government, so he worked to consolidate broad presidential powers at the legislative level (Yevisieieva & Kryvchuk, 2019, p. 15).

On June 8, 1995, the “Constitutional Treaty” was adopted on the basic principles of the organization and functioning of state power and a local self-government in Ukraine for the period before the adoption of the new Constitution of Ukraine during the period of 1995–1996. In accordance with the law, the President headed the state executive branch of government, exercised his powers through the government and the system of central and local executive bodies (Bortnikova, 2018, p. 12). The Constitutional Treaty was supplemented later on by a series of decrees issued by the President of Ukraine “On Regulations of Regional, Kyiv, and Sevastopol City State Administrations”, “Regulations on District, District State Administration in the Cities of Kyiv and Sevastopol” issued on August 21, 1995. Decree of the President of Ukraine “On Delegation of Powers of State Executive Power to Heads and Executive Committees of Village, Settlement and City Councils Headed by Them” issued on December 30, 1995, updated version of Law “On Budgetary System of Ukraine” issued on May 28, 1995. According to these legal acts, part of the powers of the local councils was transferred to the state administrations, essentially reducing the financial independence of the former. Furthermore, the Constitutional Treaty also violated the democratic distribution of powers – the chairman of the council was elected by the territorial community, while at the same time he became the head of the state administration (Kruhliak, 2020, pp. 88–89).

The adoption of the Constitution on June 28, 1996 marked the beginning of a new important stage in the development of a local self-government. According to Article 7 of the Constitution a local self-government is recognized and guaranteed in Ukraine (Moroz, 2017, p. 245). At the same time, it should be emphasized that the items related to a local self-government were of a debatable nature in various drafts of the Constitution, while some of the norms in the adopted version of the Constitution also needed a significant revision. The following experts of the Ukrainian Parliamentary Assistance Programme: Anatoliy Tkachuk, Robert Ahranoff, Trevor Braun noted that the creators of the adopted project showed little interest in thorough work on the local self-government issues. Hence, according to these

experts, the adopted norms of the Constitution of Ukraine blocked the possibility of reforming the administrative territorial system for a long time, in particular, those on the budget system (Article 95) or on the regional and district councils (Part 4 of Article 140) were ambiguous and did not clearly prescribe the mechanism for filling budgets self-government bodies, the structure of district and regional councils (Tkachuk, Ahranoff & Braun, 1997, p. 145).

The norms of the Constitution of Ukraine were in need of further elaboration regarding the regulation of the activities of local state authorities and local self-government bodies. The Verkhovna Rada developed projects brought in by the researches, associations of self-government bodies (the activity of public organizations, as evidenced by the experience of European countries, contributes to the efficiency of state administration) in order to solve the above-mentioned problems (Maliarchuk & Kogut, 2021, p. 200), in particular, suggestions were made by the Association of Cities of Ukraine and the Association of People's Deputies of Ukraine of previous convocations of the Verkhovna Rada (Tkachuk, Ahranoff & Braun, 1997, pp. 147–148).

Some of these suggestions were taken into account when considering the new law on a local self-government. The Verkhovna Rada of Ukraine considered two drafts of Law "On Local Self-Government" on October 29, 1996. The authors of the first project were the working group of the Commission on state building, activities of councils and self-Government issued on September 18, 1996, the second was developed by a working group that united representatives of the Fund for Promotion of Local Self-Government of Ukraine, employees of the Ministry for Justice, scholars of various educational institutions of Ukraine, who worked on the order of the Association of Cities of Ukraine. The first project mainly consolidated the pre-formed situation of self-government, the second, instead, offered to borrow samples of modern models of European countries and the USA (Tkachuk, Ahranoff & Braun, 1997, pp. 152–155). The first project was taken as a basis, but the Conciliation Commission of the Verkhovna Rada was instructed to reconcile the project of the Association of Cities of Ukraine with the main project (developed on the basis of the proposals of the working group of the Commission on state building, activities of councils and self-Government). The work of the conciliation group was quite effective, but the final version of the law was quite controversial (Tkachuk, Ahranoff & Braun, 1997, pp. 155–161). The experts of the Ukrainian Parliamentary Assistance Programme (A. Tkachuk, R. Agranoff, T. Brown) noted that new developments of the project in the section on the local budgets contradict the articles of the project, which divide the powers of a local self-government into their own and those delegated by the state. Such a division is formal and only declarative, so there will be difficulties with the distribution of finances. There are also other problems "rather dubious parts of the project concerning the powers of district and regional councils" (Tkachuk, Ahranoff & Braun, 1997, p. 163).

Law of Ukraine "On Local Self-Government" was adopted on May 21, 1997. According to Article 6, Part 1 of the law, the "territorial community of a village, town, city" is recognized as the primary subject of a local self-government, the main bearer of its functions and powers (Zakon Ukrainy, 1997). The councils remained the representative bodies of a local self-government at the district and region level, and local state administrations were their executive bodies (Bortnikova, 2018, p. 12). The norms of the law provided for independence of local government bodies (including the budget formation), but the sphere of a local government was clearly regulated de facto, in particular, district and regional councils were preserved as an element of management in the regions, while filling and implementation of budgets remained within the competence of local state administrations (Kruhliak, 2016, p. 12).

Thus, the law "On Local Self-Government" became a compromise between the executive and legislative powers, and at the same time combined "declarative European norms of a

local self-government with the established order of the Soviet centralization of power in the state” (Kruhliak, 2020, pp. 106–107).

The Committee of Ministers of the Council of Europe adopted a resolution inviting Ukraine to become the 37th member of the Organization on October 19, 1995. The Verkhovna Rada of Ukraine adopted the Law “On Accession to the Charter of the Council of Europe” on October 31, 1995 (Dir, Palinchak & Steblak, 2018, pp. 119–120). On July 15, 1997, the Verkhovna Rada of Ukraine adopted the Law of Ukraine “On Ratification of the European Charter of Local Self-Government” (the law entered into force in 1998) (Tolkovanov, 2012, pp. 123–124). The Charter is one of the main guidelines in the development of municipal law in European countries. The document is based on the principle of subsidiarity. Its essence is that problems that can be solved efficiently at places where they arise and should be within the competence of municipal bodies. In other cases, preference is given to lower authorities, i.e. priority in solving the problem is given to the institution that is the closest to a citizen and more under control (Chudyk & Mudrak, 2013, pp. 149–150). There are other important principles of the Charter, which lay the foundation of democracy: the mechanism of decentralization, “the relationship between the state and local interests, guarantee of protection of the rights and freedom of expression of a territorial community, non-interference by the state authorities”, guarantee of participation in a local self-government, territorial organization of power (Kruhliak, 2019, p. 99).

Accession to the statute of the Charter provided for a gradual implementation of the postulates of the document, which served as a guarantee for democratization of power in Ukraine ultimately, and for the integration of its legal system into the European norms. However, the unconditional acceptance of the European Charter of Local Self-Government in its entirety led to crisis moments in the dialogue with the Council of Europe, because Ukraine could not fulfill the obligations (Melnychuk, 2019, p. 112).

On April 9, 1999, the Verkhovna Rada of Ukraine adopted Law “On Local State Administrations”. A number of changes were introduced from the submission of the President of Ukraine, L. Kuchma, which eventually allowed the heads of local state administrations to approve the composition of local administrations themselves based on state appropriations (Kruhliak, 2020, pp. 114–115). According to A. Bortnikova, a scholar, the state administrations became “sole executive bodies of general competence, the powers of which are exercised individually by their heads – the heads of the state administrations, who are appointed and dismissed by the President of Ukraine at the request of the Cabinet of Ministers for the term of office of the Head of the state”. However, due to the imperfect provisions of the organization of power at all levels, as well as the unconstitutionality of certain provisions of the above-mentioned law, it affected its further updating in the following years (Bortnikova, 2018, p. 12).

**The Conclusions.** The process of decentralization and development of a local self-government, which began in 1990, introduced a democratic model of governance gradually, which proved to be efficient in retrospect (Sharavara & Nekriach, 2023, p. 235). The relationship between the formation of a local self-government institution in Ukraine and the processes of de-Sovietization of the power vertical was traced. Changes in a local self-government began in the last years of the USSR and Ukrainian SSR existence. However, a full development of municipal democracy took place after the adoption of Declaration on Independence of Ukraine. Local state administrations emerged, which aimed at unifying the management system under the conditions of economic crisis and significant political disagreements between the President and Parliament. The conclusion of the Constitutional Treaty was an attempt to overcome the political crisis and balance attempts to centralize power by the President. The document laid the foundations for the constitutional approval of

a local self-government. The adoption of the Constitution of Ukraine and relevant legislation in the following years was decisive for the further development of democracy and a local self-government development, the Constitution and legislation, which basically combined democratic postulates and post-socialist centrism characteristic of this period.

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**SOCIAL ENTREPRENEURSHIP IN SCIENTIFIC AND SOCIAL DISCOURSES  
OF UKRAINE (the beginning of the 21st century)**

**Abstract.** *The purpose of the research is to study the development level of a social entrepreneurship at the current stage in Ukraine, to highlight further prospects for its development, reveal scientific and social views on theoretical and practical aspects of social entrepreneurship as a new phenomenon and tendency in economy. Methodology of the Research.* To achieve this goal, general scientific and special scientific principles and methods have been applied, as well as the principles of verification, scientific pluralism, systematicity and consistency. **The Scientific Novelty.** Considering a significant interest in the problem of a social entrepreneurship issue, which can be traced in modern foreign and domestic historiography, there is the need not only to consider theoretical concepts, but also practical aspects of a social entrepreneurship in Ukraine. The full-scale invasion of the Russian Federation, the hostilities in Ukraine, the introduction of martial law had an impact on a rapid growth of the number of socially vulnerable population groups, absence or a significant weakening of their social protection mechanisms. Therefore, a social entrepreneurship with its socio-practical orientation is capable of helping to partially or completely solve the problems of socially vulnerable population

groups. It is worth noting that the study of the dynamics of a social entrepreneurship development in Ukraine, especially in recent years, is an urgent issue. In particular, in the Ukrainian and foreign historiography the main approaches to the interpretation of the term “social entrepreneurship” have been covered, the development dynamics of this type of entrepreneurial activity has been traced, and the key problems that need to be resolved have been outlined in order to increase the number and quality of changes in a social entrepreneurship effectively. **The Conclusions.** A social entrepreneurship is a type of enterprise in which, in addition to a commercial component, solution of certain social problems is provided. However, tendencies in the contemporary English-language historiography suggest a broader definition, i.e. the idea of the so-called hybrid organization, which offers not only opportunities for a financial enrichment, but also responsibility in the social sphere. It has been determined that from the 1990s to 2022, a positive dynamics of growth in the number of this type of an entrepreneurial activity can be observed in Ukraine. However, due to financial difficulties, a large part of them continue to hire workers unofficially. In Ukraine, a social entrepreneurship, in addition to financial difficulties, faces an insufficient level of grant support (the main help is given by foreign investors), in particular domestic funds, organizations, including the public sector. Legislative regulation of this type of an entrepreneurial activity also requires further development.

**Key words:** social entrepreneurship in Ukraine, social business, sociality.

## СОЦІАЛЬНЕ ПІДПРИЄМНИЦТВО В НАУКОВОМУ І СУСПІЛЬНОМУ ДИСКУРСАХ УКРАЇНИ (початок XXI ст.)

**Анотація. Мета дослідження** – з'ясувати рівень розвитку соціального підприємства в Україні на сучасному етапі, окреслити подальші перспективи його розвитку, розкрити наукові і соціальні погляди на теоретичні та практичні аспекти соціального підприємництва як нового явища і тренду в економіці. **Методологія дослідження.** Для досягнення цієї мети використано загальнонаукові та спеціально-наукові принципи і методи, а також принципи верифікації, наукового плюралізму, системності й послідовності. **Наукова новизна роботи.** Зважаючи на значний інтерес до проблеми соціального підприємництва, який простежується у сучасній зарубіжній та вітчизняній історіографії, особливої уваги потребує розгляд не лише теоретичних концептів, а й практичних аспектів діяльності соціального підприємництва в Україні. Повномасштабне вторгнення Російської Федерації, бойові дії в Україні, введення воєнного стану вплинули на швидке зростання кількості соціально вразливих груп населення, відсутність, або ж значне послаблення механізмів їх соціального захисту. Відтак соціальне підприємництво із його соціально-практичною орієнтованістю здатне допомогти розв'язати частково, або ж повністю проблеми соціально незахищених верств населення. Варто відзначити, що вивчення динаміки розвитку соціального підприємства в Україні, особливо в останні роки, є актуальним питанням. Зокрема комплексно висвітлено основні підходи до трактування терміна “соціальне підприємництво” в українській та зарубіжній історіографії, простежено динаміку розвитку цього виду підприємницької діяльності, окреслено ключові проблеми, які потребують урегулювання задля ефективного зростання чисельності, якісних змін у соціальному підприємстві. **Висновки.** Соціальне підприємництво – це вид підприємства, у якому, окрім комерційної складової, передбачено розв'язання певних соціальних проблем. Однак тенденції в сучасній англомовній історіографії пропонують ширше визначення, тобто ідею так званої гібридної організації, що пропонує можливість не лише фінансового збагачення, а й відповідальності у соціальній сфері. Стверджено, що від 1990-х до 2022 р. в Україні простежується позитивна динаміка зростання чисельності такого виду підприємницької діяльності. Однак через фінансові труднощі значна частина підприємців продовжують наймати працівників не офіційно. В Україні соціальне підприємництво, окрім фінансових труднощів, зіштовхується із недостатнім рівнем грантової підтримки (головно допомогу отримують від іноземних інвесторів), зокрема вітчизняних фондів, організацій, у тому числі від державного сектору. Потребує також подальшої розробки й законодавче врегулювання діяльності цього виду підприємницької діяльності.

**Ключові слова:** соціальне підприємництво в Україні, соціальний бізнес, соціальність.



**The Problem Statement.** A social entrepreneurship aims at implementing social changes through its entrepreneurial activity. That is, the main thing is not a commercial activity, but assistance, a social support of vulnerable groups, directing the received profit to solve socially significant problems. Unlike a traditional business model, a social entrepreneurship is a relatively new type of activity, therefore it faces a number of problems, including the lack of a clear legal regulation of activity, differentiation in terminology, and a number of bureaucratic difficulties.

**The Review of Recent Researches.** The concept of “social entrepreneurship” was first used in the USA, in the 1970s by non-profit organizations that started their business to provide job to vulnerable, socially unprotected categories of the population (Dobrova, 2015, p. 112). There is a claim that the very concept of “social business” was introduced into scientific circulation by the Nobel laureate Mohammad Yunus. In his opinion, this is an enterprise that benefits a significant number of the population (Byelova & Rosul, 2022, p. 131), this form of business should become the “leading model of capitalism”. One of the examples of this type of entrepreneurship is “Grameen Bank”, founded by M. Yunus (Dobrova, 2015, p. 112). Even more thorough explanation of “social business” and further implementation in scientific research belong to the American social businessman William Drayton. In the 1980s, W. Drayton founded the “Ashoka” project, which united social innovators from around the world (Dees, 2007, p. 24). This type of entrepreneurship, according to W. Drayton, “appears in the world, taking into account a new strategic environment, in which the social half of society’s activity becomes as entrepreneurial, competitive, productive and powerful as business” (Rahim & Mohtar, 2015, p. 11).

The term “social entrepreneurship” is widely used and has various modifications, there are ongoing discussions about the very definition (Daud-Fhiri, DIyana Ishak, Abdullah, 2018, p. 1). The main factor in the definition of “social entrepreneurship” can be considered its “sociality”, which “modifies its essence and fills it with opportunities to create special values, provide advantages to a significant part of society, while satisfying social goals” (Bila & Shevchenko, 2021, p. 29). The following are the key features of a social enterprise: an innovative activity, a dual orientation that combines non-commercial goals with the need to make a profit, a public nature of their activities, complexity of organization and development, presence of significant risks (Bila & Shevchenko, 2021, pp. 29–30).

A researcher Iryna Skorokhod classified social enterprises according to the following criteria: “degree of integration of the social programme and business processes” (K. Alter), “activity goals and direction of profit use” (H. Diz, Dzh. Emerson), “mission, availability of income from the main activity and availability of an innovative component” (Yu. Blahov, Yu. Arai), “specifics of the organization of business activities” (Skorohod, 2021, p. 126).

Therefore, the presentation of one definition to such a multi-level concept is complicated by such factors as the presence of a large number of social problems, since this business must always find solutions to solve them, the lack of a clear distinction between social entrepreneurship and charity (Skorohod, 2021, pp. 126–127).

In the English-language historiography, there is a statement that a social entrepreneurship should be aimed exclusively at social goals (missions), at the same time, if an organization (with social goals) is aimed at making a profit, then it should not be included in the list of social enterprises. This opinion was shared by Gregory J. Dees, Scott Shane, Charles Gundy, and Scott Helm. However, it is worth noting that S. Helm and Ch. Gundy noted that a social entrepreneurship is “only an extension of an entrepreneurial model used in a commercial sector” (Rahim & Mohtar, 2015, p. 12).

At the same time, there was a trend in the understanding of a social enterprise as such, which is not limited to narrow frameworks that focus only on the social goals of such cases. Instead, they recognized that it is possible to have financial goals and social missions. Globalization processes also affect the economy significantly, so the search of new competitive advantages constantly takes place (Butenko & Kot, 2019, p. 42), new forms of business interaction takes place as well (Pavlishyna & Kot, 2020, p. 137). The idea of the so-called hybrid organization, which is also called a social enterprise or social activity, was supported by the researchers Sylvia Dorado, Dave Townsend and Timothy Hart (Townsend & Hart, 2008). Thus, such hybrid organizations demonstrate the possibility of a financial growth and social responsibility (Rahim & Mohtar, 2015, p. 12). Thus, as Pamela Hartigan noted, “an organization that is also profit-oriented can also be run as a business as long as it maintains its social mission” (Hartigan, 2006, p. 42).

It is worth noting that a clearer definition of “social business” was proposed at the international conference “Social Media Week” in London in 2013. According to this proposal, “social business” is recognized as one of the trends of the next year (Dobrova, 2015, p. 113).

In 2011, a research group led by Siri Terjesen prepared an analytical report on the prevalence of social enterprises “Global Entrepreneurship. Monitor of the Report on Social Entrepreneurship”. The result of a standardized survey in 49 countries during the year of 2009 showed that “mid-economy hybrid social entrepreneurship (1.30) has a higher prevalence rate compared to non-profit social organizations (1.05)”. All regions of the world, except Western Europe and the USA, have a greater, or at least the same, level of hybrid social organizations compared to non-profit social organizations (Rahim & Mohtar, 2015, pp. 12–13).

Thus, in the Ukrainian historiography, among a number of studies of the social model of entrepreneurship, the works of I. Bila, K. Husak, V. Nazaruk, I. Skorokhod, O. Shevchenko, O. Achkasova, and R. Sholya can be highlighted. In the English-language historiography – the works of G. J. Dees, S. Dorado, C. Gundy, S. Helm, S. Shein, and the others.

Analytical studies demonstrate the growth of the level of a social enterprise, however, as the Ukrainian economists Iryna Bila and Olena Shevchenko rightly noted, there are differences in the legal status, organizational forms and classification criteria of such organizations in different countries. On the basis of legal status, the following groups of social enterprises can be distinguished: “countries with an officially defined status of a social entrepreneurship and clear criteria for its identification” (Bulgaria, Italy, Lithuania, Slovakia, Finland, Croatia); countries without fixed legal status of this type of business (Estonia, the Czech Republic); countries with officially defined status of social enterprises, but only their general characteristics (Great Britain, Denmark, Ireland, Luxembourg, Slovenia); “countries in which a social entrepreneurship is widespread without separately established norms regarding its status and identification criteria” (Austria, Belgium, Greece, Spain, the Netherlands, Germany, Poland, Portugal, Romania, Hungary, France, Sweden). And other countries in which there is no legal status and criteria for defining a social entrepreneurship, but there are similar forms of enterprises, for example, non-profit organizations to solve certain social problems (Cyprus, Malta) and “public benefit organizations” (Latvia) (Bila & Shevchenko, 2021, p. 30).

Note that when analyzing scientific, social and media sources for our research, we relied on the methodological approaches proposed in the articles of O. Katsora (Katsora, 2020), M. Haliv and V. Ilnytskyi (Haliv & Ilnytskyi, 2021; Haliv & Ilnytskyi, 2022).

**The purpose of the research** is to study the development level of a social entrepreneurship at the current stage in Ukraine, to highlight further prospects for its development, reveal

scientific and social views on theoretical and practical aspects of social entrepreneurship as a new phenomenon and tendency in economy.

**The Results of the Research.** In Ukraine, the concepts of “social entrepreneurship”, “social enterprise”, “social economy enterprises” have not been approved at the legislative level (Dobrova, 2015, p. 115). However, the very development of these concepts can be traced back to 1991 with the restoration of Ukraine’s independence. After all, in 1990, although elections to the Verkhovna Rada of the Ukrainian SSR were held, which partially renewed the composition of Parliament, Declaration on State Sovereignty was adopted, but systemic changes in the economy of the sphere began in the following years (Lukyanchenko & Zvonko, 2023, p. 118). In 1991, the Law of Ukraine “On the Basics of Social Protection of the Disabled in Ukraine” was adopted, and according to Art. 14 there was formulated a mechanism that enabled organizations representing people with special needs to establish economic enterprises “without the purpose of obtaining profit, as well as an economic and entrepreneurial activity through the creation of self-supporting institutions and organizations with the status of a legal entity, as well as enterprises based on a collective ownership of public organizations. The enterprises production of public organizations of the disabled is included in the state order in accordance with the procedure determined by the Cabinet of Ministers of Ukraine” (Nazaruk, 2017, p. 53). Such first prototypes became the following enterprises: The Ukrainian Society of Organizations of the Blind (UTOS), the Ukrainian Society of Organizations of the Deaf (UTOH) (Nazaruk, 2017, p. 54).

Regarding the next important years in the development of a social entrepreneurship, according to a researcher Vasyl Nazaruk, the key year was 2004. The “Network of Civil Action in Ukraine” (UCAN) with the financial support of the United States Agency for International Development (USAID) implemented the “Social Entrepreneurship” project in Ukraine. That is, after conducting a series of trainings with the US expert circles on the creation of social enterprises by public organizations, this phrase “entered the Ukrainian lexicon” (Nazaruk, 2017, p. 54).

During the years of 2004 – 2007, the “Network of Civil Action in Ukraine” supported 28 projects in Ukraine. In 2010, with the support of the British Council in Ukraine, Consortium “Promoting the Development of Social Entrepreneurship in Ukraine” was established, which included “Eastern Europe” Foundation, “Renaissance” International Fund, the commercial bank “Erstebank” and the international auditing company “PWC” (Nazaruk, 2017, p. 54).

Owing to the work of the Consortium, during the years of 2010 – 2013, trainings were held with international experts, and 4 resource centres for the development of a social entrepreneurship were founded in Ukraine (Kyiv, Donetsk, Sokal, Simferopol). Also in 2013, the first attempt was made to collect and systematize information about social enterprises “Catalogue of Social Enterprises in Ukraine 2013”. In addition, the “All-Ukrainian Forum I of Social Entrepreneurs” was held (Nazaruk, 2017, p. 54).

In 2013, for the first time a bill on a entrepreneurship was submitted to the Verkhovna Rada for consideration, but it was not approved (Volkova & Shevchenko, 2016, 28). According to the draft law “On Social Enterprises” dated March 11, 2013 No. 2508, submitted for consideration by O. Feldman “A social enterprise is defined as a business entity formed by a juridical person and/or individual entrepreneurs, the priority of activity is to achieve social results, in particular, in the field of health care, education, science, culture, environment, provision of social services and support of socially vulnerable population groups (unemployed, low-income, elderly, disabled and other people determined by law)” (Proekt Zakonu Ukrainy, 2013)

In 2014, the first book “Each of us Creates Change: Social Entrepreneurship and Strategic Philanthropy” was published, which covered the phenomenon of a social entrepreneurship from a theoretical and practical perspective. In 2015, Western NIS Enterprise Fund (USA) ([www.wnisef.org](http://www.wnisef.org)) with the support of USAID, “Social Investment Programme” was launched, which aimed at providing loans for the development of social enterprises through commercial banks in Ukraine (Nazaruk, 2017, p. 55).

In 2015, O. Feldman submitted a revised draft law “On Social Enterprises” dated 04/23/2015 N. 2710. However, it was not adopted again, because it received a negative response from the “anti-corruption examination of the normative legal act”. The following year, the issue of a social entrepreneurship was actively implemented in the educational and scientific sphere. In 2016, “Social Entrepreneurship” course was launched at the Lviv Business School at the Ukrainian Catholic University. It is also introduced as an elective discipline in Bachelor’s programme of the School of Social Work of the National University “Kyiv-Mohyla Academy” (Nazaruk, 2017, p. 56).

In 2016, at “II All-Ukrainian Forum of Social Entrepreneurs” there were 300 participants, i.e. three times more than at the first forum. “Catalogue of Social Enterprises of Ukraine 2016” with a description of 150 enterprises was compiled (Nazaruk, 2017, p. 56).

In connection with the aggression of the Russian Federation in the East of Ukraine and the annexation of the Crimean peninsula, new groups of socially vulnerable population groups appeared in Ukraine: internally relocated people (VPO), participants in the hostilities. Therefore, international organizations intensified their support for Ukraine, in particular, donor organizations introduced programmes to support VPO, especially for the establishment of their own enterprises. Among such programmes, it is possible to single out the “UN Development Programme, the International Organization for Migration, the International Renaissance Fund” and the others (Nazaruk, 2017, p. 56).

Thus, from the point of view of regulatory and legal provisions, in our country there are still enterprises that can be classified as social (Dobrova, 2015, p. 115). Due to the fact that the concept of “social enterprise” is not included in the normative legal acts of Ukraine, the work of such enterprises is regulated by the existing laws of Ukraine, which concern “enterprises or organizations in accordance with the organizational forms of the legal entity under which they are registered”. According to the results of the research of 2016 “Social Entrepreneurship in Ukraine” (by Natalia Husak, Victoria Kuznietsova, Tetiana Stetsenko), enterprises of this type are legally registered as “individual entrepreneurs, public organizations, public association enterprises, private enterprises, limited liability companies, charitable organizations, public association organizations, state enterprises, agricultural cooperatives, public unions” (Husak, 2017, p. 61).

Also, on the basis of the above-mentioned analytical research report, certain trends in the development of social enterprises in Ukraine can be traced. For example, the majority of them operate in large cities, the most common form of organization is the FOP; in general, enterprises that have been operating for 1 to 3 years predominate. The key areas of work are “support of socially vulnerable population groups and development of local communities” (Husak, 2017, pp. 61–62). As for the cash turnover of social enterprises in 2015, the majority of them reached the amount of up to 500,000 hryvnias. Among them, the largest expenditure items are reinvestments and wages (Husak, 2017, p. 61). Among the problems of the development of social entrepreneurship is impossibility of competition with other enterprises, at the same time, there is a lack of start-up investments (Skorohod, 2021, p. 127). Therefore, in reality, the number of social enterprises is significantly greater than static and analytical materials testify, because a significant number of employees of such entrepreneurs

are not officially employed, because they lack funds. Although a number of social enterprises are based on innovative business models, their turnover significantly lags behind “classic enterprises” (Sholia, 2019, p. 123).

Therefore, the main problem is the lack of financial and investment support from the state. At the same time, a crisis period continues in Ukraine, which, according to an economist, researcher Oksana Achkasova, has been going on since 2019 “recently the turbulence of the external environment caused by the COVID-19 pandemic has increased even more due to the introduction of the martial law and hostilities in a significant territory of Ukraine” (Achkasova, 2022, p. 38). As a result, there was a rapid increase in unemployment, in particular, an increase in the number of vulnerable categories of the population. According to the results of the study by the sociological group “Rating” at the beginning of April of 2022, 53% of people lost their jobs due to the war, 22% – continued to work in an usual mode, 21% – distant or partially, 2% – found a new job. The majority of people who lost their jobs were from the eastern regions of Ukraine (Achkasova, 2022, p. 38).

It is worth noting that despite such difficult conditions recently, in particular, as of 2022, the number of social enterprises has increased, which, according to a researcher O. Achkasova, is “a peculiar reaction to the manifestations of the socio-economic crisis and the need to find alternative sources of funding and tools in solving social problems of the most vulnerable categories of citizens” (Achkasova, 2022, p. 40).

However, despite difficult operating conditions of the majority of organizations in Ukraine, certain measures are being taken to support the Ukrainian social entrepreneurship. Among a number of projects, it is possible to single out, for example, the activities of the “Renaissance” International Fund within the framework of “EU4USociety” Project in cooperation with the European Union, which is conducting “Crowdfunding for Social Entrepreneurship” competition. The purpose of this project is “to strengthen existing social enterprises, popularize a social entrepreneurship and create a positive practice of attracting community funds by social enterprises to create new or expand operating social enterprises” (Achkasova, 2022, p. 40). Substantial support is also provided by Eastern Europe Fund, Innovation Development Fund, and Social Investment Fund. These organizations provide targeted funding by a grant support. In addition to funds that provide a financial support to projects, it is also worth mentioning agencies (TASIS, Save Children, IREX, “Open Society” Institute), which not only issue grants, but also involve entrepreneurs in joint projects (Achkasova, 2022, p. 40).

The EUnlocking project, which also supports a social entrepreneurship in Ukraine and is implemented by the Gustav Stresemann Institute (Germany), is also of great practical importance. “Egalite International” (Ukraine), organization “AXA Management Consulting” (Moldova), Association “ECO-RAZENI” (Moldova), National Centre for Aid and Information to NUO in Moldova “CONTACT” (Moldova) and “Pro NGO” (Germany). This project is financed by EU according to the programme EU4Youth (Achkasova, 2022, p. 40).

It is also worth noting that local self-government bodies partially also support social enterprises in the context of small and medium-sized business support programmes. In some regions of the country, interest rates on loans to enterprises are reimbursed, premises are rented on preferential terms (Achkasova, 2022, p. 41).

The Ukrainian economists Iryna Bila and Olena Shevchenko identified factors that restrain the development of social enterprises in Ukraine. In addition to insufficient funding from the state, the researchers pointed at problems with motivation to create social enterprises, society’s ignorance of their potential. Also, the results of the analytical study

“Social Entrepreneurship in Ukraine. Economic and Legal Analysis” conducted in 2020 with the support of the European Union proved a considerable dependence of social enterprises on foreign financing and investments. Mainly, social enterprises received support from “non-governmental non-commercial public organizations (92 %), which involve entrepreneurs in social projects, provide free educational, informational and advisory assistance” (Bila & Shevchenko, 2021, pp. 31–32)

**The Conclusions.** A social entrepreneurship is a complex concept and a relatively new way of doing business. The multilevel nature of this concept, the lack of a clear distinction between different types of socially oriented business complicates a unified interpretation. The Ukrainian historiography is dominated by the approach to the interpretation of this term through the prism of its social significance and goals, i.e. the main activity of such an enterprise is to solve social challenges of society, to help socially vulnerable population groups. Instead, in foreign historiography, mainly in English, in addition to the interpretation outlined above, the idea of the so-called hybrid organization of social enterprises is gaining popularity, hence its classification and understanding from the point of view of combining financial goals and social missions.

The Ukrainian scholars and business environment show interest in the development of this business model. After all, a social entrepreneurship contributes to the solution of a number of problems of socially vulnerable population groups, in particular their employment, adaptation in society, as well as new jobs offer, development of local communities, cooperation within local communities, etc.

Despite the difficulties associated with the full-scale invasion of the Russian Federation into Ukraine, social enterprises continue to operate, mainly owing to international support, and carry out organizational and financial assistance measures.

The social significance of social enterprises is aimed at solving urgent problems of society, improving the lives of a large part of the population and, in general, the further development of the country as a whole. For a further and effective development of a social entrepreneurship in Ukraine, the following measures should be implemented: a legislative regulation of provisions on social enterprise in Ukraine, establishment of cooperation practices of state and business structures, introduction of training courses, a broad information campaign, which would aim at increasing the level of awareness of the main advantages of this type of activity, increase the level of financing and the provision of soft loans not only by international organizations and funds, but also by domestic business environments.

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**CIVIL SOCIETY OF UKRAINE DURING THE YEARS  
OF THE RUSSO-UKRAINIAN WAR:  
CHALLENGES, VALUE ORIENTATIONS (2014 – 2024)**

**Abstract.** *The purpose of the research is to clarify the main trends in the civil society organizations development in Ukraine, in particular, the volunteer movement, charitable organizations, non-governmental (public organizations). Research Methodology.* In the article there has been used an analytical approach to a retrospective analysis of the activities of non-governmental organizations in the society. The research is also based on the principles of systematicity, a concrete historical approach, a historical and systemic method. **The scientific novelty** consists in the fact that for the first time in historical sciences, the formation of a civil society in Ukraine has been elucidated through the prism of challenges that arose in the context of the Russo-Ukrainian war of 2014 – 2024.

**The Conclusions.** After 2014, the Ukrainian civil society, responding to civilizational challenges and threats to the country's territorial integrity, qualitatively increased its influence and helped maintain the country's defense capabilities. Civil institutions become a driving force in the processes of establishing interaction between the authorities and citizens. A multifaceted support is provided by civil institutions (assistance in forced relocation from occupied settlements, a further care of internally relocated people, legal consultations, a psychological support, material subsidies, support to those



communities that will remain in the front-line territories, occupied and de-occupied regions) plays a significant role in countering disinformation, fixing the crimes of the Russian Federation, restoring the housing stock. Civil society organizations enjoy a lot of trust among the population and foreign funds, and owing to them, it is possible to accumulate a significant amount of funds from donations to solve both large-scale and specific requests of the Armed Forces, volunteer units.

During the full-scale invasion actualization of the grassroots public level proved that the Ukrainian civil society is capable of responding to crises quickly. Instead, a significant challenge for the further effective activity of these organizations is the problem of cooperation between organizations and funds, an effective distribution of financial resources, and maintenance of a stable level of activity.

**Key words:** civil society, normative legal act, law, volunteer movement, charitable organization, public organization, recognition, legitimacy.

## ГРОМАДЯНСЬКЕ СУСПІЛЬСТВО УКРАЇНИ В РОКИ РОСІЙСЬКО-УКРАЇНСЬКОЇ ВІЙНИ: ВИКЛИКИ, ЦІННІСНІ ОРІЄНТИРИ (2014 – 2024)

**Анотація.** *Мета роботи – вивчення основних тенденцій розвитку, структур громадянського суспільства, зокрема волонтерського руху, благодійних організацій, неурядових (громадських організацій). Аналіз нормативно-правового поля, його трансформацій, у якому діють інститути громадянського суспільства. Методологія дослідження.* У науковій статті використано головню аналітичний підхід для ретроспективного аналізу діяльності неурядових структур суспільства. Робота також базується на принципах системності, конкретно-історичного підходу, історико-системного методу. **Наукова новизна:** аналіз становлення громадянського суспільства крізь призму викликів, які постали в контексті російсько-української війни 2014–2024 рр. **Висновки.** Після 2014 року українське громадянське суспільство, реагуючи на цивілізаційні виклики, загрозу для територіальної цілісності країни якісно посилює свої впливи, допомагає у підтримці обороноздатності країни. Громадянські інституції стали рушійною силою у процесах налагодження взаємодії між владою та громадянами. Надають різносторонню підтримку (допомога у вимушеному переїзді з окупованих населених пунктів, подальша опіка над внутрішньо переміщеними особами, юридичні консультації, психологічний супровід, матеріальні дотації, підтримка тих громад, які залишилися у прифронтових територіях, окупованих та деокупованих регіонах), відіграють суттєву роль у протидії дезінформації, фіксуванні злочинів Російської Федерації, відновленні житлового фонду. Структури громадянського суспільства користуються великою довірою серед населення, іноземних фондів, відтак завдяки їм вдається акумулювати значну кількість коштів із пожертв для забезпечення як масштабних, так і точкових запитів від ЗСУ, добровольчих загонів.

Актуалізація низового громадського рівня під час повномасштабного вторгнення засвідчило, що українське громадянське суспільство здатне швидко реагувати на кризи. Натомість суттєвим викликом для подальшої ефективної роботи цих структур є проблема кооперації між організаціями та фондами, ефективний розподіл фінансових ресурсів, підтримка сталого рівня діяльності.

**Ключові слова:** громадянське суспільство, нормативно-правовий акт, закон, волонтерський рух, благодійна організація, громадська організація, визнання, легітимність.

**The Problem Statement.** A civil society is a complex concept that outlines the sphere of interaction of “self-operating” and social institutions separated from the state. It is also a structure of voluntary organizations of citizens who exercise their rights and interests in the public sphere. The Ukrainian sociologist Viktor Stepanenko, having reviewed the English-language historiography, which focuses on methodological approaches of defining a civil society concept, summarized that in democratic governance, a civil society acts in a similar way as the trade union, i.e. it functions in a political and cultural sphere (Stepanenko, 2015, pp. 17–19).

The American sociologist Jeffrey Alexander, rethinking the sociological thought of previous eras, offers a new theory of a civil society, which he refers to as the “civic sphere” (Friedland, 2007, p. 604). J. Alexander suggested a new approach to the interpretation of a civil

society as an independent “sphere, a world of values and institutions, which simultaneously forms the ability for a social criticism and democratic integration”. In its existence this sphere relies on the principle of solidarity and respect for others (Alexander, 2006, p. 4). Sharing J. Alexander’s view on the concept of a civil society as an “independent space of a social action and interaction” and the important role of solidarity in the formation of its institutions, one of its most important components is volunteering (Pankova, Kasperovych, & Ischenko, 2016a, p. 26). Also, the organizations of a civil society are non-governmental (non-state), charitable foundations and organizations, public associations and movements that arose on the basis of self-organization and aim at solving a certain social, economic, political, ecological, cultural problem (Stepanenko, 2015, pp. 40–41; Kravchenko & Nikitiuk, 2021, p. 6).

**The Review of Recent Researches and Publications.** In a historical and sociological perspective a civil society formation was studied by a number of the Ukrainian researchers, among them there should be mentioned the publications by Antonina Kolodiy (Kolodij, 2002), Victor Stepanenko (Stepanenko, 2015), Mykola Shulha (Shulha, 2014), Yuriy Shaihorodskiy (Shajhorodskiy, 2021, pp. 332–367). The development of a volunteer movement and its priority areas was researched by Viacheslav Holub (Holub, 2016), Oksana Pankova, Oleksandr Kasperovych, Oleksandr Ischenko (Pankova, Kasperovych & Ischenko, 2016b). A holistic image of a volunteer movement has been reconstructed in the collective research authored by the scholars of I. Krypiakevych Institute of Ukrainian Studies of the National Academy of Sciences of Ukraine (Arkusha, Lytvyn, Bondar, Lukachuk & Khlypavka, 2018). The cooperation of civil society organizations, state defense and security bodies was studied by Liudmyla Kravchenko, Tymofiy Nikitiuk (Kravchenko & Nikitiuk, 2021), Viktor Lehkodukh (Lehkodukh, 2023). Analytical sociological surveys, such as those carried out by the Institute of Sociology of the National Academy of Sciences of Ukraine (Sliusarevskiy, 2015), the Kyiv International Institute of Sociology, complement the research significantly (Hromadianske suspilstvo Ukrainy, 2023). Ukrainian scientists compiled a bibliographic index of works on the Russian-Ukrainian war (Levchenko, 2022), analyzed some works of historians (Ilnytskiy, Starka & Haliv, 2022; Haliv & Sviontyk, 2023; Telvak & Ilnytskiy, 2023).

**The purpose of the research** is the study of a of civil society development under the conditions of the Russo-Ukrainian war, the analysis of a legal support of state policy in the field of the civil society organizations development.

**The Results of the Research.** In 2014 the Revolution of Dignity, the annexation of the Crimean Peninsula by the Russian Federation and Russian aggression in the East of Ukraine became a geopolitical challenge and the cause of disorientation processes in the Ukrainian society. At that time, an active part of the society united and created a network of public organizations that helped solve urgent problems related to the supply of a medical aid, food, and equipment to the military in Eastern Ukraine and aid to the civilian population that suffered due to the war. Since 2014 a quantitative growth of a volunteer movement in Ukraine has been confirmed by the international studies. In particular, according to the rating of the annual study of charity in the world, i.e. World Giving Index (conducted by Charities Aid Foundation (CAF)) in 2010, Ukraine ranked the 150th, in 2014 – 103rd, and in 2015 – the 89th place (Bakovetska, 2020, p. 37).

In Ukraine one of the forms of manifestations of a civil society has become the volunteer movement. In Ukraine, the concept of volunteering is regulated by the Law of Ukraine “On Volunteering” of 2011. According to this law, it is “a voluntary, socially oriented, non-profit activity carried out through the provision of volunteer activities” (Zakon Ukrainy, 2011). This

law provided for the activities of volunteers only in the socio-cultural sphere and on the basis of “voluntariness, selflessness, social orientation, non-profitability” (Yatsiuk, 2023, p. 102).

After 2014, the activity of volunteer initiatives was aimed at a military and civilian support of fighters and residents in the war zone in Eastern Ukraine. Therefore, a regulatory and legal design of this activity was also updated. At the end of October of 2014, the Ministry for Finance of Ukraine issued order No. 1089 “On Approval of the Procedure for Forming and Maintaining the Register of Volunteers of Anti-terrorist Operation”, in accordance with the Law of Ukraine dated September 2, 2014 “On Amendments to the Tax Code of Ukraine on Certain Issues of Taxation of Charitable Aid”, supplemented with the final provisions of the Law “On Charitable Activities and Charitable Organizations” No. 5073-VI dated 07/05/2012. The State Fiscal Service (SFS) is obliged to create and introduce changes to the Register in an electronic form, publish these data every December on the official website.

At the legislative level, it is also provided for the insurance of people for the time of performing volunteer work, in particular according to the Federal Law “On Insurance” No. 85/96 of the Republic of Belarus dated 07.03.1996. The procedure and conditions of payments were supplemented by Resolution of the Cabinet of Ministers of Ukraine No. 604 of 19.08.2015 on “Some issues of payment of one-time cash assistance in case of death or disability of a volunteer in the area of an anti-terrorist operation, implementation of measures to ensure national security and defense, repelling and deterring armed aggression of the Russian Federation in Donetsk and Luhansk regions, hostilities and armed conflict” (Bakovetska, 2020, p. 38).

Since 2015, the legislator has been supplementing the Law “On Volunteering” actively. The areas of a volunteer activity have been expanded, in particular, it is provided that it can be carried out in the area of the anti-terrorist operation. Organizations and institutions that use the work of volunteers are allowed to insure their life and health during volunteering in accordance with the Law of Ukraine “On Insurance”. In the following years, minor changes were also made to the law on the activities of volunteers, but a comprehensive programme for promoting volunteer activities, financial support by the state, etc. was not adopted (Lypytchuk, 2022, pp. 184–185).

In February of 2022, after the full-scale invasion of the Russian Federation, the Verkhovna Rada adopted amendments to the Law “On Volunteering” regarding support for volunteering on August 15, 2022. The amendments define additional areas of activity for volunteers to overcome the consequences of armed Russian aggression (“that or another country”), a post-war reconstruction and development of the country. It was determined that the Central executive authorities, together with non-profit organizations and institutions, develop programmes to promote the development of volunteerism, as well as support the civil society institutions (Zakon Ukrainy, 2022).

According to Taras Horbachevskiy’s calculations, the first significant surge in the activity of volunteer organizations took place in 2015, when more than 250 volunteer initiatives were active in Ukraine, which aimed their activities at solving the challenges caused by the Russian aggression in 2014. The rallying of public activists and organizations usually took place in regional centres and on the basis of professional, public, educational associations (Horbachevskiy, 2019, pp. 125–126).

The researchers of the volunteer movement development in Ukraine highlight its key directions, in particular, in 2014 and 2015, a massive aid was provided to the Ukrainian army, wounded fighters and prisoners from the ATO zone, families of fighters – participants

of the ATO, families of internally relocated people, civilians who remained on the territory of the ATO (Pankova, Kasperovych & Ischenko, 2016a, pp. 29–30). Among a number of all-Ukrainian volunteer organizations that help the military, the following ones should be highlighted: “Army SOS, Charitable Fund for Army Assistance “Return Alive”, Wings of the Phoenix, Support the Army of Ukraine, Volunteers without Borders”. Among the organizations that help the military, we should also single out organizations that help individual units of the Armed Forces, volunteer associations, doctors, and people from certain regions. Instead, they supported relocated people, provided support in various fields to the families of ATO soldiers, the Coordination Centre of the City of Kyiv, DemAlliance Aid, the Volunteer Association “Everybody Can Help”, the Office Hundred of Aid to the Ukrainian Army, the Centre for Aid to Forced Migrants, the Charitable Foundation “Heart”, Logistics Headquarters, Your Support (Horbachevskyi, 2019, pp. 126–128).

On June 18, 2015, in order to coordinate the work of charitable and volunteer organizations, the Ministry for Social Policy issued the Order “On the Approval of the Regulation on the Council for the Coordination of Work on Provision of Volunteer and Charitable Assistance at the Ministry for Social Policy of Ukraine” (Polozhennia, 2015). The Coordination Council was granted the status of a permanent advisory body of the Ministry for Social Policy. The purpose of its activity is to establish cooperation between state authorities, volunteer and charitable organizations. The Minister for Social Policy, who approves its composition, was appointed Chairman of the Council (Informatsijna dovidka, 2016). At the local level, i.e. in the regions of Ukraine, following the recommendation of the Ministry for Social Policy, such advisory institutions were also created under the regional councils. Coordination councils with the support of local executive bodies and public organizations, volunteer councils, public councils under the State Administration, centres for assistance to the ATO participants, other advisory bodies (Informatsijna dovidka, 2016).

Since 2014, anti-disinformation projects have played an important role among public initiatives, including StopFake, InformNapalm, and Ukraine Crisis Media Center, Euromaidan Press, UkraineWorld, VoxUkraine (the project VoxCheck), Regional Press Development Institute, Information Forces of Ukraine, Media Detector, Ukraine-2050. The platforms check and refute distorted information, mainly the Russian disinformation, they present a pro-Ukrainian view on the situation in Ukraine, mainly the events of the Russo-Ukrainian war in English and other foreign languages (Lozovyi, 2023, p. 369).

Since 2014 a comprehensive approach to the study of various aspects of Russia’s hybrid war against Ukraine has been represented by the “Prometheus” Security Environment Centre. Founded in December of 2015, the analytical centre conducts research and investigations using open source methods (Prometej, 2023). At the beginning of their activities, Prometheus experts wrote a guidebook for journalists, diplomats, and public activists studying Russia’s occupation of the Crimean Peninsula – “The Crimea behind the Curtain. Guide to the Occupation Zone” (Krym za zavisoiu, 2019). The next guide is “Donbas is on Fire”. “Guide to the Occupation Zone” was prepared on the basis of expert consultations and interviews, materials of the International volunteer intelligence community InformNapalm. The publication records and systematizes the evidence of the participation of the Russian Federation in the war in Donbas, presents a comprehensive history of this conflict. These editions were written in Ukrainian, Russian, English, French and German. The guidebooks were published with the support of the Canadian Foundation for the Support of Local Initiatives and the InformNapalm International Volunteer Community (Donbas v ohni, 2017).

A further development of “Prometheus” related to the preparation of analytical materials that prove the fact of the Russian presence in Donbas, the involvement of the Russian military in the combat zone (Dokazy). In 2020, the centre signed a Memorandum of Cooperation to create an internet portal about the course and consequences of the Russian aggression against Ukraine. The Web portal “Virtual Museum of Russian Aggression” provides verified information about the crimes of the Russian Federation from 2014 with the beginning of armed aggression and continues to post verified data about the full-scale invasion of 2022. This online resource was published with the support of the International Renaissance Foundation. Co-creators of the resources were the state authorities, the Ukrainian Institute of National Remembrance, the Representatives of the President in the Autonomous Republic of the Crimea, the Office of the Prosecutor General. The Ukrainian Helsinki Human Rights Union, the Crimean Human Rights Protection Group, the Centre for Global Studies “Strategy XXI” and the others were also involved in the activity (Virtualnyj muzej rosijskoi ahresii, 2023).

Another important example of cooperation between the public and the military is the “Peacemaker” portal. The initiative was founded in 2015 by a group of researchers and specialists who collected and published on an online platform personal data of people who committed and are committing crimes against Ukraine. Employees of the centre also record, store data, and further investigate crimes of the Russian Federation (Lehkodukh, 2023, p. 61).

A growing role of a civil society, its effectiveness in the implementation of reforms, a comprehensive volunteer assistance to the military and civilians under the conditions of the beginning of the Russian Federation aggression testifies to the development of a regulatory and legal sphere of interaction between the public sector and the state. An important step in the development of cooperation between the state authorities and civil society institutions was the adoption of the Decree of the President of Ukraine on February 26, 2016 “On Promoting the Development of a Civil Society in Ukraine”. On the basis of this law, the “National strategy for Promoting the Development of a Civil Society in Ukraine for 2016 – 2020” was approved for the first time (Liakh, 2021). In the adopted strategy, it was emphasized that the purpose of this document is to create “favourable conditions for the development of a civil society, establishing an effective interaction of the public with state authorities, local self-government bodies on the basis of partnership” (Ukaz Prezydenta Ukrainy, 2016).

The main results of the “Civil Society Development Strategy” can be considered to be the registration procedure simplification of non-profit organizations, reduction of terms for their registration; implementation of the electronic procedure for registration of public associations, the functioning improvement of public councils activity mechanism at executive authorities, maintaining the Concept of Civic Education Development, developing a digital space for communication between executive authorities and the public – “VzayemoDiia” (“Interaction”) (Kravchenko & Nikitiuk, 2021a, p. 12). “VzayemoDiia” is an online platform that is part of the “Open Government Partnership” programme, in which the Ministry for Digital Transformation of Ukraine, the Verkhovna Rada of Ukraine, Secretariat of the Cabinet of Ministers of Ukraine, the EGAP Programme implemented by the Eastern Europe Foundation with the support of Switzerland, the National Democratic Institute, the UN Development Programme Project “Civil Society for the Development of Democracy and Human Rights in Ukraine”, the Council of Europe Project “Strengthening Public Participation in the Democratic Decision-Making Process in Ukraine” (VzaiemoDiia, 2023).

In 2020, the Government completed the implementation programme of the “Civil Society Development Strategy for the Period of 2016 – 2020”. Maxym Latsiba, the head of the civil

society development programme of the Ukrainian Independent Centre for Political Research (UNCPD) and a member of the working group on the creation of a new strategy for promoting the development of a civil society, summing up the results of the implementation of the Strategy, claimed that its postulates were only 50% fulfilled. One of the main achievements of the Strategy for the period of 2016 – 2020 in the field of interaction with the armed forces, the expert called the introduction of a transparent competition for veteran projects, their financing; implementation of a competition for the organization of people with disabilities, improvement of the funds distribution mechanisms for their activities (Yehorova, 2020).

Instead, the State Secretary of the Cabinet of Ministers of Ukraine, Oleksandr Yarema, concluded on this occasion that in general 60% of the assigned tasks had been completed, approximately 40% were still in the process of implementation. Some experts called the main problem of implementing the Strategy – a low level of involvement of ministries and regional administrations. O. Yarema, responding to these critical remarks, claimed that misunderstandings arise due to inflated expectations from the cooperation of authorities and the civil sector. In practice, in his opinion, obstacles arose due to complex procedures of intersectoral interaction “coordinating and approving action plans” (Kryvosheiev & Yehorova, 2021).

On June 16, 2021, the Cabinet of Ministers of Ukraine adopted the following “National Strategy for Promoting the Development of a Civil Society in Ukraine for 2021 – 2026”. The key strategic directions coincide with the developments in the previous document, only the tasks and expected results are substantiated more meaningfully. Therefore, the strategic directions of the Strategy for 2021 – 2026 are as follows: a further development of the public participation procedure in the creation and implementation of state policy at all levels of government; creation of conditions for institutional development of a civil society; supporting and strengthening the participation of civil society institutions in the socio-economic life of the country; establishment of better conditions for intersectoral cooperation (Kravchenko & Nikitiuk, 2021a, p. 12; Ukaz Prezydenta Ukrainy, 2021).

During the period of 2016 – 2020, there were positive trends regarding the increase in the number of civil society institutions, according to the data of the State Statistics Service of Ukraine, the number of “legal entities by organizational and legal forms of management increased: public organizations – by 22,149, public unions – by 1,122, charitable organizations – by 4428, self-organization bodies of the population – by 234” (Natsionalna stratehiia, 2021).

Under the conditions of the Russian aggression since 2014, civil society organizations that interact with the Armed Forces of Ukraine have been playing an important role. Among the consultative and advisory bodies, the Public Council under the Ministry for Defense of Ukraine should be singled out (Kravchenko & Nikitiuk, 2021b, pp. 19–20) (in 2023 reformatted into the Public Anti-Corruption Council under the Ministry for Defense of Ukraine) (Hromadska antykoruptsijna rada, 2023), Project Office of Reforms (liquidated in 2020, the Directorate of Information Policy in the Field of Defense and Strategic Communications was created instead) (Dyrektorat informatsijnoi polityky, 2020).

The main task of the Public Council under the Ministry for Defense of Ukraine, which was established in 2004, was to coordinate activities and advise public organizations and the Ministry for Defense of Ukraine. The Public Council includes representatives of various public organizations, unions and formations (27 people in total). In addition to the function of informing, an important task of the Public Council is “supervision and monitoring of the body’s provision of transparency and openness of its activities, compliance with the law” (Kravchenko & Nikitiuk, 2021b, pp. 19–20).

The reform project office was founded in 2015 as “a consultative and advisory body to ensure the coordination of changes” in the Ministry for Defense. This body was founded by volunteers from the business environment. The main achievements of the Reform Project Office can be considered the introduction of electronic procurement (Prozorro system) in the Ministry for Defense, the reform of the food system, defense procurement system, etc. (Kravchenko & Nikitiuk, 2021b, p. 22).

Civil society organizations played an important role in countering the Russian aggression in 2014. Their activity is no less significant under the conditions of a full-scale attack by Russia in 2022. The results of the sociological study “Civil Society in Ukraine under Conditions of War – 2022” demonstrated a significant increase in the number of public and charitable organizations. In 2022, 2,760 non-governmental organizations (NGOs), 6,367 new charitable organizations (BOs) were registered (in 2021, there were only 830 such newly created charitable organizations). In 2022, the largest number of new HOs, BOs were registered in Kyiv, Kyiv region, Lviv, Kharkiv, Dnipropetrovsk, and Odesa regions (Hromadianske suspilstvo Ukrainy, 2023).

The first place among charitable and public associations, in particular in the field of media recognition, belongs to the BF “Povernys Zhyvym”, UNITED 24, HO “Community Affairs”, BF Serhiy Prytula, BF Poroshenko Foundation, BO “Caritas”. The largest funds United24, Return to Life and the Prytula fund received donations in the amount of UAH 33.96 billion (almost \$1 billion) from Ukrainians and foreigners (Hromadianske suspilstvo Ukrainy, 2023, p. 7).

The main priorities in the activities of HOs/BOs after 2022 remain the assistance of the Armed Forces and victims of war, in contrast, during previous years, the activity was focused on sports, culture, education and tourism (Hromadianske suspilstvo Ukrainy, 2023, p. 9). In countering Russia, not only charitable foundations and organizations, volunteer initiatives, but also the phenomenon of Ukrainian territorial defense play an important role (Lehkodukh, 2023, p. 58).

**The Conclusions.** Consequently, the Ukrainian civil society accelerated its development after 2014. Responding to the need to mobilize forces under the conditions of a hybrid Russo-Ukrainian war, the multi-vector assistance of volunteer initiatives and non-governmental organizations is directed from increasing defense capabilities to helping internally relocated people directly affected by the war, restoring and reconstructing destroyed. The full-scale Russian invasion mobilized the organizations of a civil society (including at the grassroots level), and strengthened their cooperation. However, there is a problem of a sustainable level of involvement of citizens in the public sector activities, funding, integrity and openness.

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## РЕЦЕНЗІЇ / REVIEWS

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**SOCIO-ECONOMIC PROCESSES IN THE WESTERN REGION OF THE UkrSSR IN 1964 – 1991 (peer review of the monograph: Malyarchuk O. M. Socio-economic Processes in the Western Region of the Ukrainian SSR (1964 – 1991): monograph. 2nd ed., revised and supplemented. Ivano-Frankivsk: Symphony Forte, 2023. 552 p.**

**СОЦІАЛЬНО-ЕКОНОМІЧНІ ПРОЦЕСИ В ЗАХІДНОМУ РЕГІОНІ УРСР У 1964 – 1991 рр. (рецензія на монографію: Малярчука О. М. Соціально-економічні процеси в західному регіоні Української РСР (1964 – 1991): монографія. Вид. 2-ге, переробл. і допов. Івано-Франківськ: Симфонія форте, 2023. 552 с.**

As a result of the collapse of the USSR and totalitarian system, owing to the abolition of political and ideological censorship and a gradual declassification of archival documents, there appeared the possibility of a more thorough and comprehensive study of the history of Ukraine during the Soviet period.

In modern historiography, there is considerable work on the specified issue, but the main part of it primarily deals with various aspects of social and political history of Ukraine. Instead, the issues of a social and economic development of Soviet Ukraine are not primary.

A number of complex scientific issues are meant that deal with the analysis of individual branches of the Soviet economy – industry, agriculture, construction, transport and communication, financial system, etc., as well as the social sphere, an everyday life of population.

Therefore, the peer-reviewed monograph by Oleh Malyarchuk\* on the socio-economic development of the western region of the Ukrainian SSR in 1964 – 1991, is of a considerable scientific interest, taking into consideration the lack of a thorough special research on this issue.

The research is logically structured, written according to the problem-chronological principle and elucidates the main issues that make up the subject of the study. The monograph consists of Introduction, six Chapters, 23 Subsections, Conclusions, a List of Abbreviations, a List of References, as well as Appendices – 14 statistical tables and four documents.

In the monograph there is made the attempt to do analysis on socio-economic processes in the western regions of the Ukrainian SSR in 1964 – 1991, there is elucidated the essence of the Soviet economic model and revealed certain specific features of its functioning in the western regions of the Republic.

The monograph by O. Malyarchuk is based on significant sources. The author analysed the documents of nine state archives of Ukraine – the Central State Archive of Public Associations of Ukraine, the Central State Archive of Higher Authorities and Administration of Ukraine and the state archives of the western regions of Ukraine, making direct references to 33 funds, 43 inventories, 340 cases.

The researcher involved a number of published documents of the party and Soviet bodies, many collections of documents and materials, statistical reference books (70 titles). At the same time, the author should have analysed the statistical reference books “National Economy of the Ukrainian SSR” for the entire period under study, and not only for a few separately selected years. This approach would have provided an opportunity to analyse the trends and dynamics of the socio-economic development of the Republic and its western regions more thoroughly.

It is significant that in the monograph the author recorded and appropriately used the memoirs of contemporaries (10 people), that in its turn enriched the research with interesting historical details from the history of the western region of the Ukrainian SSR. But in the monograph there are no references to the published memoirs, in particular, of the party and Soviet functionaries at the time, although they would have complemented the analysis of the Soviet economic strategy. It would have been worthwhile to make a wider use of the press materials, republican, regional and district newspapers of the period under analysis.

In Introduction the topicality of the issue, the goal and objectives of the research, its chronological framework, geographical boundaries, scientific novelty and practical significance are elucidated. In Chapter 1 traditionally there is analysed the historiography of the issue, the source base of the research and its theoretical and methodological foundations, in particular the conceptual and categorical apparatus. At the same time, in detail the author explains the approaches of various scholars to the issues of methodology, but does not always define his point of view clearly, his own attitude to the mentioned issues and key concepts.

In the monograph there are raised a number of important scientific issues. In detail O. Malyarchuk dwells on the strategy of economic development of the USSR, considers changes in the economic concept of the Soviet leadership, the issue of industrialization of the western region of Ukraine, attempts to introduce new forms of organization and labour stimulation, the state of engineering and technical potential in the region.

The author focuses on the issues of industrial development, characteristics of its individual branches, primarily forestry, paper and woodworking. In the monograph it is written that at the beginning of the 1960s, the total area of the state forest fund of the western regions of the Ukrainian SSR was 2,320.7 thousand hectares, or 46% of the area of the Republic's forests. The richest forests were in Zakarpattia, Ivano-Frankivsk, and Rivne regions, where more than half of all wood stocks in the Ukrainian SSR were located.

From the beginning of the 1950s, a large cardboard and paper plant in the town of Zhydachiv operated in Lviv region. It employed 16% of all workers in the paper industry of Ukraine and produced 43% of paper and cardboard products. An important role in the development of this branch of industry was played by Kostopil plant, Mukachevo furniture plant, Chynadiyevo and Novovolynsk woodworking plants, and the others. In Zakarpattia,

Ivano-Frankivsk, and Chernivtsi regions, complex enterprises were established – timber processing plants, and in the rest territory of the western regions – forestry enterprises.

The author dwells in detail on the analysis of the work of the “Prykarpatlis” association, which included 12 timber processing plants in Ivano-Frankivsk region. They were engaged in forestry, processing of wild fruits, berries, mushrooms, logging and deep wood processing and furniture making. Similar associations were established in Zakarpattia and Chernivtsi regions. However, the progressive anthropogenic impact on the environment, as the researcher states, caused the reduction of the area of forests, impoverishment of their biodiversity, simplification of structure and productivity reduction.

O. Malyarchuk focuses on the analysis of oil and gas industry. In the 1950s, the Carpathian region was the centre of oil and gas production in Ukraine. The key role was played by the Dolyna oil industry, one of the largest plants in the industry – Nadvirna Oil Refinery – operated successfully. However, in the second half of the 1960s, the industry centre moved to Left Bank – Dnipro-Donetsk region. In 1965, Prykarpatia produced 46.2% of the entire Republic’s oil production, while in 1970 – only 19%. During a historically short period, under the conditions of the directive Soviet economy, the efficiency of the region’s oil and gas industry steadily decreased, and the oil and gas fields of Prykarpatia were depleted.

One of the sections of the monograph deals with the problems of the chemical and mining complex of the western region of Ukraine. The author provides an extensive factual material related to the chemical industry, individual enterprises of this industry, but too sparingly covers the issue of the coal industry development in the region, the Lviv-Volyn coal basin. The author presents coal production statistics only for the years of 1960 – 1970, completely omitting the data for the next two decades (it should be emphasized that the chronological framework of the study goes back to the beginning of the 1990s). In addition, the subsection lacks information about the environmental and social consequences of industry in the region, about the state and prospects of coal mines, the future of towns and villages located near mines, implementation of relevant social projects, etc.

In the monograph there are outlined certain aspects of the development of Group “B” industry, i.e. the production of consumer goods. But less factual material is mentioned as compared to the previous issues. The researcher analyses the state of the light and food industry in the western regions of the Ukrainian SSR, writes about the network of sewing, knitting, textile haberdashery, leather and footwear enterprises, as well as bakeries, meat processing plants, dairies, canning, confectionery and chocolate factories, etc. Heavy industry (Group “A”) was always a priority in the economic policy of the CPSU, and the production of consumer goods and satisfaction of the population’s daily needs were considered secondary objectives, which led to a shortage of food, basic necessities, to massive queues in stores, etc.

The so-called new course of the Party-Soviet leadership in agriculture, launched in the spring of 1965, is analysed on the basis of a significant factual material; the state of some of its branches, primarily agriculture and animal breeding, is under analysis; the personnel corps of workers and specialists is analysed. In the monograph there is elucidated the social policy of the Soviet government during the period under study, including redistribution of labour resources, development of a social and cultural sphere, an everyday life of the population, and environmental protection activities. O. Malyarchuk showed some manifestations of the population’s social activity, in particular the development of the dissident movement, the activity of religious communities, the revival of national consciousness during the period of Gorbachev’s “perestroika”.

It is important to emphasize that the researcher sought to trace the internal logic of the processes that took place in the western regions of Ukraine in 1964 – 1991. In other words, to show the connection between the state of economy, a social sphere of society, an everyday life of the population and the nature of the Soviet totalitarian system, a rigidly centralized system management, the peculiarities of the functioning of a planned, directive, command and administrative model of the economy, which was subject to a single union leadership and constantly neglected the interests of the Union Republics, individual regions of Ukraine, the urgent needs of country's ordinary citizens in order to solve "all-union objectives and plans", "large-scale strategic issues", etc.

At the same time, it should be noted: elucidating certain aspects of the issue, the author mainly refers to an illustrative statistical material for a certain year or several years. However, such a generalizing monograph requires a detailed statistical analysis of each raised issue (industry and its branches, agriculture, social sphere), which allows tracing the dynamics of the studied processes for the entire period – with the indication of an initial period (the year of 1964), an intermediate one (for example, the years of 1970, 1980, 1985) and a final one (for the year of 1991). In the monograph, there are no such summary tables that would reproduce the dynamics of the development of the described phenomena for the entire period – from 1964 to 1991. In addition, a chief focus should be on clarifying the specifics and features of the socio-economic development of the western regions of the Ukrainian SSR.

In general, O. Malyarchuk's monograph makes a positive impression, it testifies to the author's significant scientific experience, deep knowledge of the research subject, an extensive use of various sources. The Conclusions to the monograph present the most important results obtained by the scholar, which contain the formulation of the solved scientific issues. The Appendices contain an extensive statistical material, which deepens the scientific analysis of the issue and complements individual subjects of the research. In our opinion, O. Malyarchuk managed to achieve the specified goal, solve the objectives and elucidated the main tendencies of the socio-economic development of the western regions of the Ukrainian SSR in 1964 – 1991. We believe that the reviewed monograph is notable for its topicality, scientific novelty and fills one of the gaps in modern Ukrainian historiography.

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**RUSSO-UKRAINIAN WAR: A VIEW OF A CONTEMPORARY**

**(peer review of the book by Volodymyr Viatrovych. Our Century.**

**Short Essays on the Long War. Kharkiv: Ranok, 2023. 256 p. (“History” Series))**

**РОСІЙСЬКО-УКРАЇНСЬКА ВІЙНА: ПОГЛЯД СУЧАСНИКА**

**(рецензія на книгу: Володимир В’ятрович. Наша століття.**

**Короткі нариси про довгу війну. Харків: Ранок, 2023. 256 с. (Серія “History”))**

The 21st century brought new challenges to the world history. The Russo-Ukrainian war became an event that caused a strong resonance in the modern civilized world. The origins of this confrontation should be sought in the thousand-year history of the development of two peoples, and essentially two diametrically opposed civilizations. A historian whose field of scientific interests is the Ukrainian liberation movement, Volodymyr Viatrovych and his book “Our Century. Short Essays on the Long War” should be singled out among the scholars who dealt with the problem of the Ukrainian-Russian confrontation. The peer-reviewed social and political edition was published by the Kharkiv publishing house under the “History” Series. Structurally, the material is presented in 45 chapters, essentially 45 history lessons by the author. The book is based on V. Viatrovych’s own conclusions and observations. The author interestingly and accessible highlights his views on the latest events and connects them with

the historical features of the development of Ukraine and Russia. The material is presented in a sufficiently balanced manner. The thematic illustrations in the sections that successfully present their content deserve a chief focus. A modern, original design of the text with the latest information content at the end of each chapter allows you to communicate with the author on the Internet about the key moments of the story.

V. Viatrovych substantiates the thesis that the Russo-Ukrainian war has begun long before February 24, 2022, and the reasons for the confrontation lie in previous years and centuries. However, it was on that day that the war burst into the lives of millions of the Ukrainians, dividing it into “before” and “after”. The peaceful lives of millions have changed, and the lives of thousands have been cut short. According to the author, the origins of this war can be traced back to the first attempts of the Ukrainians to create their own independent state. Back in 1917, the Russian imperialism, as one of the participants in this war, fought under different flags (three-coloured and red-coloured), different ideologies (communist and Russian), pursuing one unchanging goal – to destroy everything Ukrainian (p. 16).

We support the author’s opinion that the war did not break out in 2014, but almost a hundred years earlier. Understanding the origins of this conflict is important because it makes us stronger. Conscious Ukrainians are able to analyse and expose the same criminal methods that Russia has been using against us for many years, because we have a colossal experience of several generations of heroes and awareness that right now we are continuing their struggle. All this makes us stable and resilient in the modern Russo-Ukrainian war (pp. 23–25).

According to V. Viatrovych’s point of view, the history of Ukraine and Russia is rather a history of confrontation than a myth about the existence of two brotherly nations. The neighbouring country, which has encroached on the territorial integrity of Ukraine in recently, appeared on the map of Europe after the absorption of the Ukrainian lands. The birth of the empire took place from a gradual destruction of the Cossack state, from the appropriation of the name “Russia” stolen from the Ukrainians – the Greek origin of the word “Rus”. Centuries of the imperial policy of absorption of the Ukrainians began to appear – from the Cossack elders’ joining the Russian nobility and a systematic destruction of a language and culture.

At the beginning of the 20th century the Kremlin’s plans failed. The Ukrainian national movement grew into the national revolution. Almost until the mid-1920s, the empire was weakened by the uprisings in Central and Southern Ukraine. In the 1930s, the Ukrainians resisted collectivization, for which the regime organized the artificial Holodomor. Later, a large-scale insurgent movement covered Western Ukraine, challenging the USSR, which defeated Nazism and conquered a significant territory of Europe. The Kremlin had to struggle with such manifestations of independence for more than a decade after the war.

A modern warfare is unique in its massive nature. Not only military personnel take part in it: every Ukrainian joins the national resistance movement. That is why, V. Viatrovych calls it People’s war rightly (p. 25).

An important element of the state is its army. Throughout the centuries, the Ukrainians had no signs of statehood, but in the 16th and 17th centuries established a powerful military formation – the Cossack army. And the official name of the state of Hetman Bohdan Khmelnytsky Zaporizhzhia Army clearly emphasizes the basis of its origin (Chapter “The Ukrainians – People-Army” p. 33).

In the 20th century during the Ukrainian revolution of 1917 – 1921, the question of creating an army arose again. Despite the lack of attention from the political leadership, the armed forces of the Ukrainian People’s Republic were formed and for four years resisted



more powerful formations. It was not possible to obtain statehood at that time. However, at the cost of their own lives, the Ukrainians laid the foundations for further struggle.

During World War II, the interests of two totalitarian regimes – the Communist and the Nazi – clashed on the territory of Ukraine. The existence of an independent Ukrainian state was not included in the plans of any of them. The Ukrainians were seen as a resource for meeting their own military needs. Under such conditions, a powerful Ukrainian Insurgent Army was established, which formed our national identity. In the rear of the Soviet empire, a large-scale resistance movement continued until the mid-1950s. The movement laid a new stage in the history of Ukraine. In seven decades, the Ukrainian army will have all the symbols of the UPA: anthem, greeting, flag (p. 34).

In 2014, once again the Ukrainians demonstrated their brilliant ability to be the nation-army. Soldiers, volunteers, and workers of creative professions stood up to protect the state borders. The people’s war for independence began. The people-army opposed the aggressor state, the marauding state, the mercenary state – the Russian Federation.

In the section “Why is Ukrainian Nationalism Necessary for Ukraine and the World?” the author emphasizes that the modern war with the empire is not a war for territories, but for a worldview (p. 40). In such a confrontation, it is extremely important that the Russian manipulative ideological machine is opposed by a powerful Ukrainian idea. Therefore, the Ukrainian nationalism with its democratic character meets the requirements of the time best. This ideology emphasizes the difference between both peoples in culture, language, views on history. The Ukrainian nationalism must put an end to the attempts of the Russian imperialism to threaten all civilized humanity in the 21st century.

Racism plays a significant role in the construction of the “Russian world” – a mixture of the legacy of the Romanov empire and the Bolsheviks who destroyed it. The main component of this worldview is social hatred of the wealthy and successful. The author believes that racism turns Russia’s war against Ukraine into genocide today. Mass atrocities, robberies, and murders in many Ukrainian settlements became clear evidence of this (p. 51).

We support the author’s opinion about the wasted two decades of independence, which contributed to the loss of Ukraine’s military potential. The political elite made gross mistakes and failed to distinguish rivals from enemies of the state. The Ukrainian society began to realize the importance of having its own armed forces after the start of the war with Russia in 2014.

In the section “Why Ukraine Lost a Hundred Years ago and Why it Can Win now”, V. Viatrovych substantiates his opinion about why we can win the war with Russia. Our ancestors went through a difficult historical path in the bloody 20th century. Today, the majority of residents of Ukraine consider themselves Ukrainians. Therefore, there is no problem with national self-awareness. The independence and integrity of Ukraine was recognized all over the world owing to the effective work of our diplomacy and diaspora. For the first time in our history, we are receiving powerful military aid. The entire civilized world stood against the enemy, which is attacking from the territory of two countries nowadays. Thus, we have much better conditions for victory than a hundred years ago. The author summarizes that peace with an aggressor country can cost more than war itself (pp. 67–69).

In the chapter “Terror against the Occupiers”, V. Viatrovych emphasizes that the Russian aggression has returned us to the past. The terms “underground”, “collaborator”, “occupier” have become relevant today. In enemy-controlled territory, manifestations of resistance are underground, and the struggle is quite often terror. Killing an occupier or a collaborator today is not a crime, but a deserved revenge and saving thousands of people (pp. 78–79).

The author highlights the role of S. Bandera and other figures of the national liberation movement positively (Chapters “Why Russia is still Afraid of Bandera”, “Why it is Useful to Remember the UPA”). V. Viatrovych draws attention to the fact that even nowadays Moscow opposes free Ukraine and anti-Soviet sentiments that are dangerous for it, because they are the ones that pose a threat to the Russian leadership. The Kremlin is still afraid of Bandera, because Bandera is the Ukrainian resistance, even in a hopeless situation, it is reliance on one’s own strength, it is people’s faith in their victory, it is the death of the Russian Empire (pp. 95–99).

The Ukrainian insurgent movement of the second half of the 20th century became an example of a long-term opposition to the Soviet occupation. The successful practice of insurgent warfare is still useful today, because it stands in the way of protecting Ukrainian women and children (p. 108).

Historical excursions and drawing parallels with modernity are a successful toolkit, with the help of which we can recognize a unique style of the author. In the section “Ukrainians are Indomitable – from the UPA to Azovstal” it is emphasized that under modern conditions we have to continue the same methods of struggle that Bandera followers carried out – the struggle for freedom. In the 20th century the Russian imperialism was dressed in the Soviet uniform (in Russian – himnastiorka), today it appeared in the uniform of the Armed Forces of the Russian Federation. The ability to resist even under hopeless circumstances remains important for the Ukrainians. The heroic confrontation of the indomitable fighters of the Azovstal is similar to the underground struggle of the UPA (p. 117).

The dissident movement played an important role in the path to Ukrainian independence. Its first wave began in 1965. It entered history with the names of Ivan Dziuba, Viacheslav Chornovil, and Vasyl Stus. The resistance to the existing Soviet regime continued. In the 1970s, a new wave of arrests swept through Ukraine. The authorities brutally dealt with Ivan Svitlychny, Yevhen Sverstiuk, the indomitable Vasyl Stus and Viacheslav Chornovil, Ihor and Iryna Kalyntsi, Valery Marchenko, Vasyl Ovsyenko, Yevhen Proniuk, and Vasyl Lisovy. All of them were arrested. In 1976, with the creation of the Ukrainian public group to promote the implementation of the Helsinki agreements, the activists Levko Lukianenko, Myroslav Marynovych, Oksana Meshko, Mykola Rudenko, and the others were also arrested.

Brutal repressions did not destroy the spirit of freedom, but on the contrary, they radicalized the Ukrainian society. The dissident movement exploded with renewed vigor at the end of the 1980s. It was headed by former political prisoners – the Horyn brothers, Ihor and Iryna Kalyntsi, Levko Lukianenko, Viacheslav Chornovil.

A physical fatigue and exhaustion of the leaders of the resistance movement did not diminish their political activity. Ukraine began the path to independence owing to the adoption of important documents – Declaration on Sovereignty and Act of Proclamation of Independence (Chapter “People vs Dictators. How Dissidents can Destroy the Regime”, pp. 120–121).

In the book there are described in detail the stages of mass protest actions that took place on the Maidans, starting in 1990. The focus is on the treasonous policy of V. Yanukovich and the pseudo-patriots who supported his programme of transforming Ukraine into Russia (Chapter “Through the Maidans to Freedom”, pp. 137–141).

Gradually, the author leads to the idea: everything that Russia is doing today is not just war, but genocide of our people. This is a genocide about which more than one study can be written. Bloody pages of the Ukrainian history of the 20th century shed light on the modern interpretation of events. History, as you know, is a teacher of life. Therefore, a

modern generation is a witness to those events that will later be included in textbooks on the history of Europe. A story is unfolding before our eyes, about which we cannot remain silent. Mass murders, repressions, destruction of villages and cities, infrastructures are facts that are incomprehensible to the civilized world. The Russian leadership will be forced to answer for the crime of genocide against the Ukrainians (Chapter “It’s not just War – It’s Genocide”, pp. 162–168).

V. Viatrovych’s statement “Russian-speaking Ukraine is necessary for the enemy and it is mortally dangerous for the Ukrainians” is beyond doubt. It is clear that the empire seeks to create the Russian-speaking environment wherever its army steps and fill it with the Russian content. Russification undermines the roots of our statehood, promotes the advancement of the “Russian world” to the west. The language is one of the elements of our identity as a nation, an element of national individuality. The Ukrainians cannot underestimate the real threat posed by ignoring the native language not only in an everyday life, but also in the public sphere. Today, we are forced to defend not only the geographical borders of Ukraine, but also the linguistic ones, so that “the Russian world has no chance” to seize our territory (pp. 143–146).

The author’s optimistic opinion about the future day of victory is clearly visible in the book. The heroic defense of the indomitable cities of Kharkiv, Kyiv, Irpin, Bucha, Sumy, and Chernihiv is worthy of respect at the highest state level. The numerous losses of the Russian army and the heroic resistance of the Ukrainian people, the sanctions of foreign countries are designed to destroy the demographic and economic indicators of the aggressor country. The author believes that in the end all these things will undermine Russia from the inside once and for all (Chapter “Hell for the Invader”, p. 159).

The cooperation of the Ukrainians with the Baltic nations is a vivid example of confrontation since the days of the Soviet empire. Former insurgents from Ukraine and Lithuania managed to break the dictatorship of criminal prisoners in Stalin’s camps. The uprisings are meant in Vorkuta, Kengir, and Norilsk in 1953 – 1954. They dismantled the GULAG system and destroyed the USSR.

After the aggressor’s full-scale invasion of Ukraine, the Baltic states accepted thousands of Ukrainian refugees. Among the allies that consistently support us, the most active, in the author’s opinion, is Lithuania. Common pages of history brought the two peoples closer together. Citizens of this small country, unlike many Europeans, understand the real threat from Russia too well (Chapter “With Lithuania against Moscow”, pp. 221–227).

Thus, in a number of thematic sections of his book, the author tried to explain why the war started. He shared unique information, gave an assessment of the event of the modern Ukrainian-Russian confrontation through the prism of history. The professional view of a specialist and an eyewitness to many events builds a clear historical background in our imagination, explains the causes and consequences of the aggression of a neighbouring state.

We hope that the V. Viatrovych’s book will be useful for learning the history of the confrontation between Ukraine and Russia. The author’s approach to the presentation of the material is made in a new format. This is a vision of the history of victories of the country that overcame fear and death and boldly chooses its way to civilized Europe.

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