

МІНІСТЕРСТВО ОСВІТИ І НАУКИ УКРАЇНИ
ДРОГОБИЦЬКИЙ ДЕРЖАВНИЙ ПЕДАГОГІЧНИЙ УНІВЕРСИТЕТ
ІМЕНІ ІВАНА ФРАНКА
MINISTRY OF EDUCATION AND SCIENCE OF UKRAINE
DROHOBYCH IVAN FRANKO STATE PEDAGOGICAL UNIVERSITY

ISSN 2519-058X (Print)
ISSN 2664-2735 (Online)

СХІДНОЄВРОПЕЙСЬКИЙ ІСТОРИЧНИЙ ВІСНИК

EAST EUROPEAN HISTORICAL BULLETIN

ВИПУСК 33
ISSUE 33

Дрогобич, 2024
Drohobych, 2024

*Рекомендовано до друку
редакційною колегією Східноєвропейського історичного вісника
(протокол від 29 листопада 2024 р. № 4)*

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дисертаційних робіт на здобуття наукових ступенів доктора і
кандидата наук у галузі «ІСТОРИЧНІ НАУКИ»
(Наказ МОН України № 358 від 15.03.2019 р., додаток 9).

Східноєвропейський історичний вісник / [головний редактор В. Льницький]. Дрогобич:
Видавничий дім «Гельветика», 2024. Випуск 33. 258 с.

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Scopus, Web of Science (Emerging Sources Citation Index), DOAJ, ERIH PLUS, Index Copernicus;
DOI: 10.24919/2664-2735.33

Статті збірника прирівнюються до публікацій у виданнях України, які включені до міжнародних
науково-метричних баз відповідно до вимог наказу МОН України від 17 жовтня 2012 р. № 1112
(зі змінами, внесеними наказом МОН України від 03.12.2012 р. № 1380).

*Свідоцтво про державну реєстрацію друкованого засобу масової інформації
«Східноєвропейський історичний вісник» Серія КВ № 22449-12349Р від 28.12.2016 р.*

Усі електронні версії статей збірника оприлюднюються на офіційній сторінці видання
<http://eehb.dsru.edu.ua>

Засновник і видавець – Дрогобицький державний педагогічний університет імені Івана Франка.
Адреса редакції: Дрогобицький державний педагогічний університет
імені Івана Франка, вул. Івана Франка, 24, м. Дрогобич, обл. Львівська, 82100.
тел.: (0324) 41-04-74, факс: (03244) 3-38-77, e-mail: halivm@yahoo.com

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університет імені Івана Франка, 2024
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*Recommended for publication
by the Editorial Board of the East European Historical Bulletin
(protocol dd. 29.11.2024 № 4)*

Under the Order of the Ministry of Education and Science of Ukraine, the collection is included in CATEGORY "A" of the List of electronic professional publications of Ukraine authorized to publish theses of applicants for the degree of doctor and candidate of sciences in the field "HISTORICAL SCIENCES" (Order of the MES of Ukraine № 358 on 15.03.2019, Appendix 9)

East European Historical Bulletin / [chief editor Vasyl Ilnytskyi]. Drohobych: Publishing House "Helvetica", 2024. Issue 33. 258 p.

This collection is meant for scholars, history lecturers, postgraduates, doctorants, students and all the readership interested in historical past.

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The collection is indexed in the international databases:

**Scopus, Web of Science (Emerging Sources Citation Index), DOAJ, ERIH PLUS, Index Copernicus;
DOI: 10.24919/2664-2735.33**

*The articles are equaled to publications in Ukrainian journals entered in international scientometric databases
in accordance with the MES of Ukraine order dd. 17 november 2012 p. No. 1112
(amended by the MES of Ukraine order dd. 03.12.2012 No. 1380).*

Print media registration certificate «East European Historical Bulletin» series KV No. 22449-12349P dd. 28.12.2016

All electronic versions of articles in the collection are available on the official website edition
<http://eehb.dspu.edu.ua>

Founder and Publisher: Drohobych Ivan Franko State Pedagogical University.
Office address: Drohobych Ivan Franko State Pedagogical University, Ivan Franko Str., 24, Drohobych, Lviv Region,
82100. tel.: (0324) 41-04-74, fax: (03244) 3-38-77, e-mail: halivm@yahoo.com

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UDC 94(498.4-21)“17”
DOI 10.24919/2519-058X.33.317451

Călin ANGHEL

PhD (History), Lecturer of the Department of History, Archaeology and Heritage, “1 December 1918” University of Alba Iulia, 5 Gabriel Bethlen Street, Alba Iulia, Romania, postal code 510009 (calin.anghel@uab.ro)

Scopus-Author ID: 55193762000

Келін АНГЕЛ

доктор історії, викладач кафедри історії, археології та спадщини, “1 грудня 1918” Університет Альби Юлії, вул. Габріеля Бетлена, 5, м. Альба Юлія, Румунія, індекс 510009 (calin.anghel@uab.ro)

Bibliographic Description of the Article: Anghel, C. (2024). Urban transformations in 18th century Transylvania: the case of two provincial towns, Sebeş and Alba Iulia. *Skhidnoievropeiskyi Istorychnyi Visnyk [East European Historical Bulletin]*, 33, 8–26. doi: 10.24919/2519-058X.33.317451

**URBAN TRANSFORMATIONS IN 18th CENTURY TRANSYLVANIA:
THE CASE OF TWO PROVINCIAL TOWNS, SEBEŞ AND ALBA IULIA**

Abstract. *The towns in Transylvania appeared in the first decades of the fourteenth century and went through a spectacular evolution in the Middle Ages. However, during the sixteenth and seventeenth centuries their development gradually decreased. In the early modern age, shortly after the inclusion of the Principality of Transylvania in the Habsburg Empire (ca. 1690), the newly acquired province had only three free royal towns and 65 boroughs. Not only the number of urban settlements was low, but these had rather small size, and their economy lagged behind that of other cities of the empire. Of these, many small towns were in difficulty, having been partly depopulated and having accumulated considerable public debt. Thus, after Transylvania was incorporated into the Habsburg Empire, its cities continued their development. Most of them underwent changes in their morphology during this period, reaching a new stage in their territorial enlargement. While the inner fabric of the urban structure of most of the old cities was not affected, apart from some localities where it was only slightly changed, the peripheral areas suffered numerous transformations. The suburbs expanded dynamically. The density of buildings increased concomitantly with a considerable territorial enlargement. Some localities, such as Alba Iulia, underwent massive restructuring of the inhabited areas as new neighbourhoods and suburbs planned according to modern urban rules appeared. In this article, a detailed analysis of the urban development of two Transylvanian cities: Sebeş, free royal town during the Middle Ages, capital of the homonymous Saxon Seat, and important trade and commercial center and Alba Iulia, an episcopal seat during the medieval period and after 1542 capital of the Principality of Transylvania. After 1690, Alba Iulia developed as an important military center of the Habsburg army. At Sebeş, new suburbs were constructed beyond the medieval city walls because of internal development, with the contribution of the local authorities, at least in one case. At the same time Alba Iulia underwent a radical transformation triggered by the construction of a new fortification with bastions encircling the former medieval fortress. The urban settlement existing in the vicinity of the medieval fortress was relocated to new emplacements.*

Key words: *Free royal town; oppidum; The Principality of Transylvania; The Habsburg Empire; intra muros town; suburbs.*

МІСЬКІ ТРАНСФОРМАЦІЇ В ТРАНСІЛЬВАНІЇ XVIII ст: ПРИКЛАД ДВОХ ПРОВІНЦІЙНИХ МІСТ, СЕБЕША ТА АЛЬБА-ЮЛІЇ

Анотація. Міста в Трансільванії з'явилися у перші десятиліття XIV ст. і пройшли через вражаючу еволюцію в середні віки. Проте протягом XVI – XVII ст. їх розвиток поступово зменшується. На початку Нового часу, незабаром після включення Князівства Трансільванія до імперії Габсбургів (бл. 1690 р.), новопридбана провінція мала лише три вільні королівські міста та 65 містечок. Міських поселень було мало, вони відзначалися невеликими розмірами, а їхня економіка відставала від інших міст імперії. Багато малих міст перебували в скрутному становищі, оскільки частково втратили населення та нагромадили значні борги перед державою. Після входження Трансільванії до імперії Габсбургів її міста продовжили розвиватися. Більшість із них за цей період зазнали морфологічних змін, вийшовши на новий етап укрупнення території. Водночас внутрішня тканина міської структури більшості старих міст не була порушена, за винятком кількох поселень місцевостей, які змінилися незначно. Проте периферійні території зазнали численних трансформацій, зокрема динамічно розширювалися передмістя. Одночасно зі значним територіальним розширенням зростає щільність забудови. Деякі населені пункти, такі як Альба-Юлія, зазнали масштабної реструктуризації, оскільки з'явилися нові райони та передмістя, сплановані відповідно до сучасних міських правил. У цій статті детально проаналізовано міський розвиток двох трансільванських міст: Себеша, вільного королівського міста в середньовіччі, столиці однойменного Саксонського села, важливого торгового й комерційного центру, а також Альба-Юлії – єпископської резиденції в середньовічний період і столиці Князівства Трансільванія після 1542 р. Після 1690 р. Альба-Юлія стала важливим військовим центром армії Габсбургів. У Себеші нові передмістя за сприяння місцевої влади були побудовані поза стінами середньовічного міста через внутрішній розвиток. Тоді ж Альба-Юлія зазнала радикальної трансформації, викликаній будівництвом нового укріплення з бастіонами, що оточували колишню середньовічну фортецю. Міське поселення, що існувало в околицях середньовічної фортеці, було перенесене на нові терени.

Ключові слова: Вільне королівське місто; *oppidum*; Князівство Трансільванія; Імперія Габсбургів; *intra muros* місто; передмістя.

The Problem Statement. This article focuses on the evolutions of the cities located within the Carpathian Arch during the eighteenth century in the context of changes undergone by the Transylvanian society because of its incorporation into the Habsburg Empire. The analysis considers both the general evolution of the urban phenomenon in this period, as well as the transformation of the urban structure. While the inner fabric of the *intra muros* areas of most of the old cities did not undergo noticeable changes (or when such changes did occur, that structure was only partially affected, as was the case at Alba Iulia, after 1713 and Sibiu, from 1726 to 1733), the peripheral areas experienced tremendous transformations. The existing suburbs or those constructed during this period knew expanded significantly, in some cases even spectacularly. In fact, these transformations represent stages of the redefinition of the morphology of these localities up to nowadays. Two of the Transylvanian cities are analysed in detail, Sebeş and Alba Iulia. The analysis examines the urban transformations, and the reconfigurations suffered during this period as well as the causes which produced them. The two cities evolved differently in time, due to their geographical and historical conditions and to their functions. Sebeş earned relatively early the status of free royal city, became an important crafts and trade center and capital of the homonymous Saxon seat, part of the Saxon organization. Alba Iulia was successively an episcopal city, from mid-sixteenth century capital of the princes of Transylvania, and from ca. 1690 an important military center of the Habsburg army. Despite these different evolutions, during the eighteenth century the two localities were comparable in size and population, both faced demographic and economic challenges which affected their later development.

The Emergence of the Transylvanian Medieval Towns

Despite the fact that there had been an urban tradition of over a century and a half during the Roman era¹, the urban phenomenon saw the light of day rather late in medieval Transylvania; it was only in the early fourteenth century that we could speak of the legal existence of towns. The causes of this delay are numerous; among them, we need to mention the most important: late migration, the lengthy process of conquering and integrating Transylvania into the Hungarian kingdom and the Mongolian invasion of 1241 – 1242². The emergence of medieval towns in Transylvania is largely similar to that across the Hungarian kingdom³; there are, however, some particularities specific to a peripheral area as well as a delay of a few decades compared to Hungary.

Even though in the late thirteenth century some settlements were mentioned in the royal and regional documents as having the statute of a city (*civitas*) – Alba Iulia (1282), Rodna (1292) and Turda (1296) (Niedermaier, 1993, p. 23) – the existence of the actual towns during that period in time should be met with some reservations. While it might have been normal to refer to the first settlement, Alba Iulia⁴, as being a town since all the bishop residencies in the Hungarian kingdom were traditionally referred to as *civitas* (Engel, 2006, p. 278), in the case of the other two – both mining centres – the fact that they were given town-specific privileges speaks more about the importance of mining in the Hungarian kingdom during that period.

In the early fourteenth century, some settlements, this time from a different category, crafts centres, start to differentiate themselves from the rural settlements around them and be known as towns (*civitas*) (Niedermaier, 1993, p. 24) in the official documents from the first years of that century's first decade. With a few exceptions, these were concentrated in the south of Transylvania which had been colonized by the Saxons, that is the territory between Orăştie and Drăuşeni which had remained in the possession of the king known as *fundus regius*⁵ where guests (*hospites*) were allowed to settle. The following were mentioned as having the statute of a town: Cluj (1316), Orăştie (1324), Sibiu (1326) (Niedermaier, 2012, pp. 221–223), Bistriţa (1330) (Băldescu, 2012, p. 172), Sebeş (1341) (Anghel, 2011, p. 24), Braşov (1344), Mediaş (1359) and Sighişoara (1367) (Niedermaier, 2016, pp. 450, 469). Thus, they built a network of towns situated at an average distance of 60 km from one another, i.e. the distance one could cover on horse in one day (Niedermaier, 1993, pp. 21–23), and with one important urban centre at every border entry/exit point (Rădvan, 2011, p. 79).

The Towns of Transylvania in the Middle Ages

Starting with the mid-fourteenth century, the towns of Transylvania saw a spectacular, unprecedented economic evolution, a development which generated prosperity and triggered significant demographic growth and important urban achievements, such as the construction of the great parochial gothic churches and the beginning of works to fortify the inhabited areas. The causes of this phenomenon are manifold. Firstly, there was the attitude of the kings of the Anjou dynasty who ruled between 1308 and 1382 and wanted prosperous towns for pragmatic

¹ Of the 11 towns of the Roman province Dacia (*Ulpia Traiana Sarmizegetusa, Napoca*, the two *Apulum* towns, *Potaissa, Ampelum, Porolissum, Romula, Drobeta, Dierna, Tibiscum*), seven were situated in present-day intra-Carpathian Transylvania (the former from the list above), of the other four, there were two in Banat and two in Oltenia. For the history and towns of Roman Dacia please refer to Ardevan, 1998 and Ardevan, Zerbini, 2007.

² For information about late migrations, the conquest of Transylvania by the Hungarians and about the Mongol invasion of 1241 – 1242, please refer to Spinei, 1996 and Spinei, 2006.

³ For details about the emergence and evolution of towns in the Hungarian kingdom in the medieval period, please refer to Engel, 2006, p. 269–289 and Rădvan, 2011, pp. 48–83.

⁴ Alba Iulia was and still is the seat of the Latin Episcopate of Transylvania created in 1009 as tradition says. The documents, however, mention it for the first time much later, in the year 1111 when a bishop named Simon is also mentioned. For details about the history of the Episcopate please refer to Dincă, 2017.

⁵ This territory, which the German ethnics called *Königsboden* and the Romanians *Pământul Crăiesc* (*The Land of the Lords*) is the area where the Saxons set up their settlements and where they lived until its disappearance following the 1876 reforms. The noblemen would rule over and live in the territory of the seven counties while the Szekelys were settled to the east of Transylvania for military reasons (on the Szekely land or Székelyföld). See Gündisch, 2001, p. 34.

reasons, so that they could bring income to the treasury, have strong stone-made ramparts and provide well-armed soldiers (Băldescu, 2012, pp. 43–44). The towns were provided with numerous economic privileges, such as the right to organize weekly or annual fairs, exemptions from customs fees or storage rights, but there were also legal privileges including administrative and legal autonomy; all these factors contributed considerably to their economic development. This was topped by the effects of the medieval agrarian crisis, which caused the prices of crafted goods to go up, both as the prices for agricultural products bottomed out (Niedermaier, 1992, pp. 151–152), and with the benefits brought to the foreign trade carried out by the Transylvanian towns by the setting up of the medieval extra-Carpathian Romanian states: Wallachia (1330) and Moldova (1359) (Niedermaier, 2012, p. 224).

The highest degree of urbanization was reached by the *free royal towns* which were in fact endowed by the Hungarian kings with the most privileges (Rüsz-Fogarasi, 2003, p. 85); in medieval times, this category included all the afore-mentioned towns. In the hierarchy of Transylvanian towns the lowest position was occupied by boroughs (*oppidum*), which had a lower degree of urbanization and were somewhere between a town and a village population-wise (Rădvan, 2011, p. 54). They had certain privileges such as that of organizing a fair, but their administrative and legal autonomy were limited compared to towns.

Most settlements which became towns (*civitas*) were located in the *fundus regius* and the explanation for this is simple: their inhabitants were descendants of the Saxon colonists who had arrived in Transylvania starting in the twelfth century and who, besides being free people, also had a well-defined relationship with the royalty dating back to 1224 when a decree was issued on the matter, known as the *Andreanum*⁶. They did not depend on any feudal master be it a nobleman or an ecclesiastic entity, but were subordinated directly to the king himself.

On the other hand, the settlements from the counties⁷, under the ruling of various noblemen or ecclesiastic entities, rarely rose above the level of mere boroughs (*oppidum*) (Rüsz-Fogarasi, 2003, p. 85); there were, nevertheless, a few exceptions: Cluj, Turda and Dej. In the medieval period, this category included: Alba Iulia (Gálfi, 2021a, p. 79), Gilău, Zalău (all owned by the Transylvanian Diocese) (Rüsz-Fogarasi, 2003, p. 174), Aiud (for a period in the possession of the Alba Iulia clergy), Viñu de Jos, Teaca, Gilău, Reghin, Hunedoara, Deva and many others, most of them in the property of various noble families. The modest development of these settlements may be explained through the relation of dependence upon feudal masters who were not fond of the idea of the settlements receiving privileges, as this could have compromised their authority over them (Rüsz-Fogarasi, 2003, p. 167).

In the territory occupied by the Szekelys⁸, urban life emerged a bit later (Rüsz-Fogarasi, 2003, pp. 41–42); it was only in the fifteenth century that settlements such as Târgu Mureş, Târgu Secuiesc (1427), Sfântu Gheorghe (1461) and Odorheiu Secuiesc (1485) (Hermann, 2020, pp. 49–51) were documented as boroughs (*oppidum*). These settlements continued their development in the following sixteenth and seventeenth centuries, and among them Târgu Mureş became a *free royal town* (Man, 2006, p. 35) in 1616 against the backdrop of sustained economic growth.

This is the framework in which the Transylvanian towns continued their development in the fifteenth century, too; during this time, the most important ones – Sibiu, Braşov, Cluj, Bistriţa, Sighişoara, Mediaş and Sebeş – erected ramparts and completed their morphology and their mainly gothic silhouettes, largely preserved until the present day.

⁶ For details about the rights and duties of Transylvanian Saxons, please refer to Rüsz-Fogarasi, 2003, pp. 38–40 and Engel, 2006, p. 140.

⁷ In the Middle Ages, there were seven counties in intra-Carpathian Transylvania: Alba, Cluj, Turda, Solnocul Interior, Dăbâca, Hunedoara and Târnave. See Rüsz-Fogarasi, 2003, p. 43.

⁸ The Szekelys were settled in eastern Transylvania and mainly had military duties and the obligation to defend the eastern border. The territory occupied by them in the Middle Ages included seven seats: Odorhei, Mureş, Ciuc, Sepsî, Orbai, Kézdi and Arieş. See Hermann, 2020, p. 38.

The Transylvanian Towns in the Principality Era

In the sixteenth century, once Hungary had been defeated by the Turks in 1526 at Mohács, Transylvania entered a new stage in its evolution as a state as it became an autonomous principality under Ottoman sovereignty⁹. In 1556, the princes established their residence in Alba Iulia, in the palace which had up until then housed the Roman Catholic bishops of Transylvania¹⁰; thus, the town on the river Mureş became the capital of the principality.

The hierarchy of the Transylvanian settlements remained unchanged; *free royal cities* remained the most important urban centres of the country. Of these, the settlements of Sebeş and Orăştie lost their town statute and became boroughs while their place was taken by Alba Iulia, the new capital of the principality and also by Târgu Mureş in 1616 when the latter became the first town of the Szekely settlements. Braşov, Cluj and Sibiu continued the accelerated development which they had started in the previous centuries and stood out among the other urban centres, thus becoming the strongest, most important and most populous towns of Transylvania¹¹.

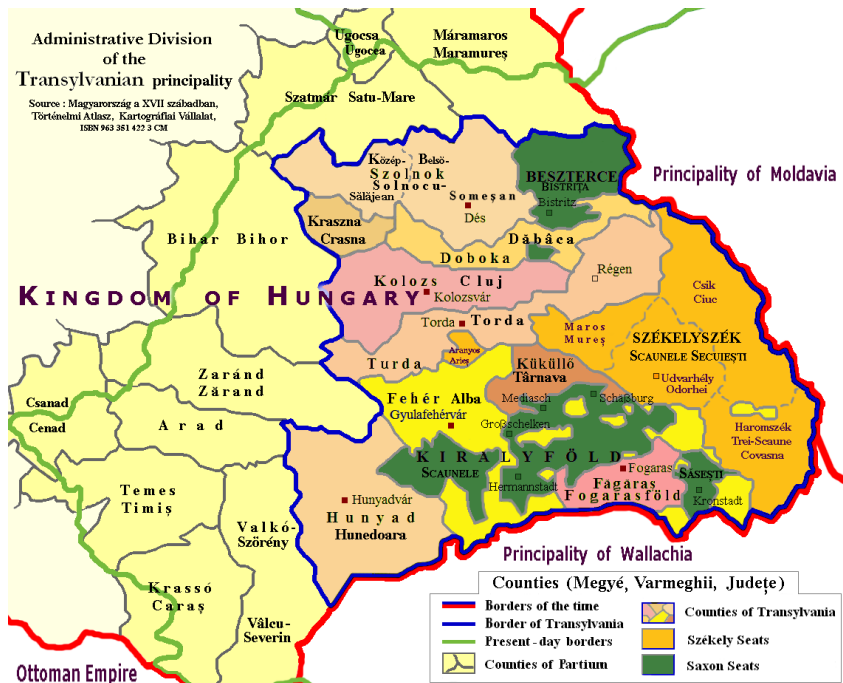


Fig. 1. Transylvania's administrative structure and main towns in the seventeenth century

(source: <https://ro.m.wikipedia.org/>)

⁹ For a history of the Principality of Transylvania please refer to Şerban, 1991, pp. 21–30.

¹⁰ Against a backdrop of unrest from after 1526 which led to the weakening of the central authority, but also following the appointment of some uninspiring bishops, the religious Reform was swiftly adopted by the Saxons and the Transylvanian noblemen (most of them Hungarians). In just a few decades, Transylvania became a mainly protestant principality and in 1556 the Roman-Catholic Diocese of Transylvania was closed and its assets seized. See Pop, 2003, pp. 459–468.

¹¹ In the late sixteenth century, Braşov had approximately 11,000 inhabitants and Cluj and Sibiu around 8,000 each. See Niedermaier, 2012, p. 242.

From an urban development perspective, the towns did not suffer notable transformation between the sixteenth and seventeenth centuries. The era of major construction work had ended with the completion of the parochial churches and urban fortifications. Renaissance architecture in particular influenced new and radically renovated buildings, mainly the houses of patricians of the larger towns of Transylvania: Sibiu, Braşov, Cluj and Bistriţa. On the other hand, the peripheries of settlements saw the emergence and later on the growth of the gardens of well-off Saxons, known as *Meyerein*¹², which looked more like parks at that point in time (Niedermaier, 2016, p. 549). Their emergence may be linked to the increased prices of agricultural products, a sign that the medieval agrarian crisis had been overcome (Pop, 2021, p. 129). Another phenomenon specific to this period is the setting up of new suburbs in the proximity of fortified cities which would extend to become neighbourhoods of the former in the following centuries.

In spite of these evolutions, the development of Transylvanian towns during the principality remained below their real potential. The causes for this were numerous but included a great many natural calamities and epidemic phenomena over those two centuries on the one hand, and, on the other, violent events such as the Turkish-Tartar invasions of 1658 and 1661 – 1662 which affected many towns and especially the country capital, Alba Iulia. Other causes related to the specificity of the social structure of Transylvania and also to the relative isolation of the autonomous principality caused by its Ottoman sovereignty. The consequence of it all was a visible delay in the development of Transylvanian towns and society overall; this also persisted into the modern era, until the radical reforms carried out after 1867.

The Transylvanian Towns in the Eighteenth Century

Transylvania joined the Habsburg Empire in the late seventeenth century as a consequence of the political and military evolutions of the time, generated by the defeat of the Turks under the ramparts of Vienna in 1683 and by the military successes that followed which led to the reconfiguration of the foreign policy and the area of interest of the House of Habsburg. Under these circumstances, Transylvania became important for the empire, which therefore made diplomatic efforts, doubled by military pressure to control it. To hasten its conquest, a struggle which seemed to have reached a stalemate in 1690, the court in Vienna accepted that Transylvania should preserve the same rules as it had during the principality and that the privileged estates or political nations (the nobility, the Saxons and the Szeklers) should maintain their political and economic privileges. Based on these principles and following negotiations between the two parties in Vienna, a document known as the *Diploma Leopoldinum* was drawn-up, then ratified on 4 December 1691; on the basis of this, Transylvania was to be governed as a province of the Empire¹³.

According to this document, the Diet continued its activity and the old legal codes remained valid, along with the municipal statutes on the basis of which the region's towns had been managed since as early as 1583 (Pop, 2021, p. 39). The title of Prince of Transylvania was taken over by the Emperor; nevertheless, instead of ruling directly, he used governors as intermediaries who had limited prerogatives and were appointed by him from amongst the important Saxon families residing in Sibiu.

The Transylvanian urban network remained poorly developed, characterized by just a few small towns, well behind the urban centres of the other provinces of the empire due to the

¹² Or *măierişti*; the name is derived from the German *Meyerein*, as these gardens were known. These gardens expanded over time, becoming farms in the 18th century.

¹³ For details about how Transylvania became part of the Habsburg Empire, please refer to Magyari, 2003, pp. 369–374.

fact that their economy was rather medieval, still dominated by craftsmen's guilds. The same hierarchy of urban settlements remained: *free royal towns* and boroughs. While in the early eighteenth century there were only three towns in the first category, all situated in *fundus regius*, by 1786 their number had risen to 11: Alba Iulia, Sibiu, Braşov, Cluj, Bistriţa, Sighişoara, Sebeş, Târgu Mureş, Orăştie (Răduţiu & Edroiu, 2002, p. 85), Gherla (Szongott, 2014, p. 197) and Dumbrăveni (Andron, 2000, p. 50), the last two founded by Armenian colonists who had converted to Catholicism¹⁴. These were followed by 65 boroughs (Andea, 2002, p. 378) of which three were noble (*oppida nobilium*) and had the same statute as the towns, except lacking representation in the Diet¹⁵. The most populous town was Braşov with 17,792 inhabitants followed by Sibiu with 14,066 (Răduţiu & Edroiu, 2002, pp. 85–86) and Cluj with 13,928 (Agachi, 2006, p. 40). We should add that these figures also include the inhabitants from the suburbs beside those living in the actual town, *intra muros* (Răduţiu & Edroiu, 2002, pp. 85–86).

Reforms initiated during the eighteenth century had no great impact on the Transylvanian towns. Neither did the *Concivitas Edict* of 1781 which granted people of ethnicities other than German the right to purchase properties in the *fundus regius* (Abrudan, 2017, p. 88), as Saxon towns preserved the same ethnic structure, in general. Nonetheless, the suburbs grew in size and their population made up of Romanians registered a significant increase compared to in the previous centuries.

In fact, the suburb dynamic may be seen as a notable change in terms of the urbanism of the time. The *Meyereien* on the outskirts of towns also grew and turned into genuine agricultural farms, inhabited by the peasants working on them. Most of the towns did not undergo changes in the urban structure of the inner area (*intra muros*) during this period, in spite of a relative renewal of the built space. When such changes occurred, they affected only partially the morphology of the inner space, as was the case in Alba Iulia after 1713 and Sibiu, between 1726 and 1733. Where new buildings were erected or old ones were radically transformed, architectural, structural or decorative elements specific to the Baroque style are visible. One notable such example is the town of Cluj, where a large number of Transylvanian noble families settled (87 of them in 1770) (Agachi, 2006, p. 39); besides the palaces, these families have left us with another approximately 80 mansions and residencies (Porumb, Vlăsceanu, 2018, p. 87).

One particular case is that of new settlements and even of some of the new neighbourhoods of older towns which adopted new solutions in their design in line with the urban development principles of the time, that is the use of a chessboard-patterned plan drawn-up on a board to define their morphology. This did not only apply to the settlements created by the Swabians of Banat during the eighteenth century, but also to others inside the Carpathian range such as: Blaj, Gherla and the new centre of the town of Alba Iulia.

Another manifestation of the baroque style is represented by the ramparts built in the proximity or even on the location of some Transylvanian towns during the eighteenth century. The first such construction is the citadel in Cluj, erected between 1716 and 1735 on a plateau near the town to shelter an Austrian garrison (Rusu, 2015, p. 35). But the most important and strongest Transylvanian fortification was that erected between 1715 and 1738 in Alba Iulia in the place of an older one, which would profoundly alter the urban structure of the former capital of the principality¹⁶.

¹⁴ For the Armenian colonization of Transylvania, please refer to Pop, 2002, pp. 24–29.

¹⁵ In Hungary during the same period there were almost six times more towns than in Transylvania. See Dumitran, 2014, pp. 121–123.

¹⁶ For details about the bastion fortification in Alba Iulia, please refer to Goronea, 2007.

The Towns of Sebeş and Alba Iulia in the Eighteenth Century

Of all Transylvania's urban centres, two neighbouring towns will be subject to a detailed analysis and have their urban evolution monitored throughout the eighteenth century: Sebeş¹⁷ and Alba Iulia¹⁸. The first was part of the *fundus regius* and had been for a long time a *free royal town* and residence of the Saxon seat of Sebeş and the second was located in the county territory and had initially been a modest borough. This was where the bishops of Transylvania resided together with the count of Alba before it became a capital of the Principality and acquired numerous privileges. In the eighteenth century, after its re-instatement in 1713, the town became a residence of the Roman-Catholic Diocese of Transylvania. What's more, Alba Iulia also became a significant military centre following the building of the strong Vauban-style bastion fortification.

As might be expected, the two towns evolved differently over the years, each depending on the legal status it had in the various periods. Founded by Saxon colonists, Sebeş had been an important crafts and trading centre in the Middle Ages and had acquired the statute of a town quite early (1341), thus becoming a *free royal town*. Subsequent political and economic evolutions, however, did not allow it to keep up with the important urban centres of Transylvania: Braşov, Sibiu and Cluj, nor even with Bistriţa, Sighişoara and Mediaş; from as early as the fifteenth century the settlement lost the statute of a town repeatedly. It did recover it in the late eighteenth century, when demographic evolutions seemed to indicate a revival of the town's economy.

Alba Iulia, by comparison, a settlement created in the proximity of ancient *Apulum*, protected by the former *castrum* of the 13th Legion Gemina¹⁹, rebuilt as a fortification during medieval times, hosted one of the most influential institutions of the state, the Diocese of Transylvania, which was also its owner until it was closed in 1556 (Marton, Jakabffy, 2007, p. 36). From that moment and until the late seventeenth century, Alba Iulia was the capital of Transylvania; most princes endowed the town with privileges to stimulate its development. Their efforts, however, were not successful. Alba Iulia was not a crafts centre or a trading one. Besides, the town was situated on a trading route of secondary importance and in addition to that, the fact that it was one of three rather important towns – Sebeş, Alba Iulia and Orăştie – that were very close to one another led to the partial overlapping of their markets, which in its turn contributed to a stifling of their economic development (Niedermaier, 1993, p. 25).

The first decades of the eighteenth century were a difficult period both for Sebeş and for Alba Iulia, marked by demographic losses and other forms of deprivation with roots in the previous centuries. During the seventeenth century the regression of the town of Sebeş which had started in the previous centuries continued, strengthened by its conquest and destruction in 1661 by the Turkish-Tartar armies (Amlacher, 1886, pp. 5–7). The economic decline was also exacerbated by a significant demographic crisis. In the early eighteenth century there was a considerable increase in population, but it was due to the Romanians who lived in the suburbs (Streitfeld, 1981, pp. 121–135). In 1703, the town had 1,933 inhabitants, of which 956 were Romanians, 902 Germans, 40 Hungarians, 15 Armenians, 15 Serbs and 5

¹⁷ The Saxon name of the settlement was Mühlbach, the Romanian name was Sebeş and the Hungarian name Szászsebes.

¹⁸ Although Alba Iulia, the name of the town, was established in the sixteenth century, each ethnic group of Transylvania continued to call it *the White citadel* in their own language: Bălgrad – in Romanian, Gyulaféhevár – in Hungarian and Weissenburg – in German. See Anghel, 2021a, pp. 14–17.

¹⁹ For information about the two *Apulum* towns and the Legion XIII Gemina *castrum*, please see Moga, 1999, pp. 175–180.

Jews. Although the population did go up a bit in the following decades, reaching around 2,000 inhabitants according to some estimates between 1720 and 1740, it later dropped again because of a plague epidemic of 1738 – 1739 which caused 227 deaths (Dörner, 2002, p. 195). The town came to a situation where it had few contributors and could not pay the debts it had accumulated. In 1748 the town debt amounted to 82,178.68 florins (Möckel, 1929, p. 17), though two years later, in 1750, it had dropped to 48,985.23 florins²⁰.

In Alba Iulia things were even worse; the former capital of the principality felt the ripple effects of the destruction caused by the Turkish-Tartar armies in 1658 and 1661 – 1662, which had caused major destruction to the city and led to its partial depopulation. Countless properties were deserted as the locals chose to leave for other towns. Even the ruling princes came to prefer living in Făgăraș, which was defended by stronger ramparts. The settlement did not recover completely in the following decades either, as shown by the data comprised in the 1676 conscription according to which almost a quarter of the town properties were deserted. Of the 505 buildings and lands that existed in the outer town at that point in time, situated on 18 streets, 123 were deserted. It is likely that the situation did not change significantly in the early eighteenth century either, when the new Austrian authorities decided to build the Vauban-type bastion fortification in Alba Iulia in the place of the former fortress. It was to cover a surface five times larger, and in order to build it, they had to tear down the walls of the fortress and town constructions outside the walls; the works started in 1713 (Anghel, 1994, p. 292).

The Urban Evolution of Sebeș in the Eighteenth Century

Situated on the lower course of the river of the same name, the town had been founded by German colonists in the second half of the twelfth century. It was first documented in 1245 under the name of Malembach in the context of the efforts made by the Roman-Catholic church to mitigate the social effects caused by the Mongolian invasion of 1241 – 1242. A century later, as the socio-political circumstances improved, the settlement had been declared a town (1341) and had become one of the *free royal towns*. The economic strength it had acquired was a consequence of the efforts of the local craftsmen and merchants; during that time, Sebeș had become one of the most important towns in Transylvania²¹.

The town had developed around the central parochial church, whose construction had started in the early years of the thirteenth century²². The religious building, a fortified Roman basilica had been flanked by markets to the east and west; the first and biggest of these markets had played an important role in the economic and urban evolution of the settlement. In the second half of the fourteenth century, the apse of the church had been replaced by a hall-like gothic choir with the intention of rebuilding the entire church (Klein, 1976, pp. 23–59). Shortly after the choir was erected, a new large-scale urban project had been launched as the entire town was to be surrounded by a walled enclosure. Works had started around the year 1387 and had lasted for a few decades, though the exact moment when the fortification was completed remains unknown (Salontai, 2022, pp. 115–133). In the fifteenth century, once the two major construction projects had been completed, incorporating the parochial church and the enclosure, which both left their imprint on the morphology and architecture

²⁰ The debt had been contracted since the year 1700 as the town had borrowed various amounts to use for the town's needs and the schools; such amounts were to be returned in instalments with an interest rate of 6%. For some of these amounts the creditors were supposed to provide agricultural works or pay in kind with must. Please see Gyémánt et al., 2016, pp. 393–394.

²¹ For details about the genesis of medieval Sebeș and its subsequent evolution, please refer to Anghel, 2000 – 2001, pp. 59–65.

²² Regarding the territorial expansion of the locality, during the 12th to 15th Centuries, see Iacob, 2004, pp. V–VI.

of the town, no other important urban works were to be started that would change the urban structure of the settlement. The town had fallen into a crisis and the economic difficulties were to persist through the following centuries, too.



Fig. 2. The town of Sebeş in 1769
(*Stuhl Mühlenbach in dem Grosfürstenthum Siebenbürgen*,
source: <https://maps.hungaricana.hu>)

In the first decades of the eighteenth century the town was largely similar to its Middle Ages version (fig. 2), except for the fact that buildings made of more durable materials – stone and brick – would gain ground compared to wooden buildings. In the actual town, bordered and protected by the walled enclosure, the inhabited space was aligned along four main streets around which they had built as many *quarters*, named as follows: Jacobi, Sicularum, Rosarum and Petri (fig. 3 a) (Anghel, 2009, pp. 488–489). To the west of the inner town, along the river Sebeş, on its left bank, there was a suburb inhabited by Romanians and known as *Hochstadt*; it had probably been there since the sixteenth century, but it was documented starting from the eighteenth century (Anghel, 2011, pp. 169–177).

The economic crisis experienced by the town in the first decades of the eighteenth century, together with the demographic crisis, imposed the need for urgent measures for the improvement of the situation. These were probably the main drivers in the decision to allow German emigrants who had just arrived in Transylvania to settle on the territory of the town. As a result, several groups of colonists had settled in Sebeş by 1740, 583 persons in total, most coming from the Baden-Durlach County (Dörner, 2002, p. 87). The newcomers were settled on a field situated to the north of the town, along the Morii Canal, at the junction of the old road to Alba Iulia with the road to Daia. The new suburb was separated from the Romanians by this canal and the river Sebeş, and the *Meyerein* separated it from the *intra muros* town. The newcomers' plots of land were aligned along a new street lying parallel with the river – Altgasse (now Progresului Street) – which intersected Quergasse (currently Dorobanți Street) to the south, formed in the following years and leading to the village of Daia when Lutheran colonists coming from Upper Austria settled there (fig. 3 b).

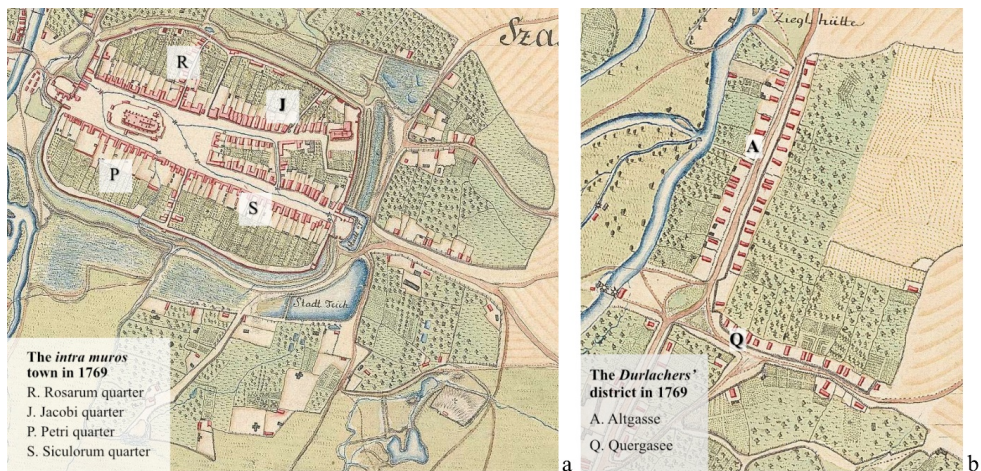


Fig. 3. Sebeş in 1769 (details): a) the *intra muros* town; b) the Durlacher's district (*Stuhl Mühlenbach in dem Großfürstenthum Siebenbürgen*, source: <https://maps.hungaricana.hu>)

The efforts made to revitalize the town did not end there, and in 1770 another smaller group of emigrants arrived in Sebeş – 176 people also from the German world, this time from Hanau. Upon their arrival, the territory of the new suburb was divided in two, to the discontent of the first newcomers, who went to the town authorities (Streitfeld, 1984, p. 35). Nevertheless, new emigrants were also given plots of land similar in size to those of the first wave of newcomers and situated immediately after those. On the eastern end they built a new street – Neugasse (currently Avram Iancu Street) – parallel with Altgasse (Progresului Street). The land of its east site was also divided into plots, and Quergasse (Dorobanți Street) ended up uniting the two newcomers' streets to the south.

Besides the emergence of this new suburb, there was another urban transformation which would leave its mark on the evolution of the town of Sebeş later on: the emergence of new *Meyerein* and the development of the old ones upon the former glacis of the fortification. In fact, in the sixth decade of the eighteenth century there were already several street fronts

on its northeast, east, southeast and south sides (**fig. 2**) (Nacu, 2019, p. 170). A new suburb of the town was emerging and in the following period this would play an important role in reconfiguring the town's morphology (Anghel, 2011, p. 175).

In the nineteenth century, the town of Sebeş was to enter a new phase in its evolution characterized by modernization; the dominant trend would be that the inner town would try to step out of its "isolation" of the previous centuries and be afforded easier communication with the suburbs. Thus, a few breaches were to be made in the inner wall to provide access to those inner streets which could communicate with other streets from the suburbs. The barbicans of the fortifications were to be demolished, together with the related gates and towers, except for one tower of the western gate and a fragment of the gate arch which would remain to this day. The suburbs of the town were also to be touched by modernization. The Saxon lands of the *Meyerein* were gradually to be divided into plots and sold. This evolution, coupled with demographic growth, would lead to the densification of the built base both in the suburbs and in the former *Meyerein*. By the mid-nineteenth century their entire territory would be covered with houses. The built base would become increasingly dense both in the Romanian district and in that of the *Durlachers*, and the town would spread to the south as well, where new streets were built. Broadly, it would reach the limits of its future development, only to be exceeded in the second half of the twentieth century.

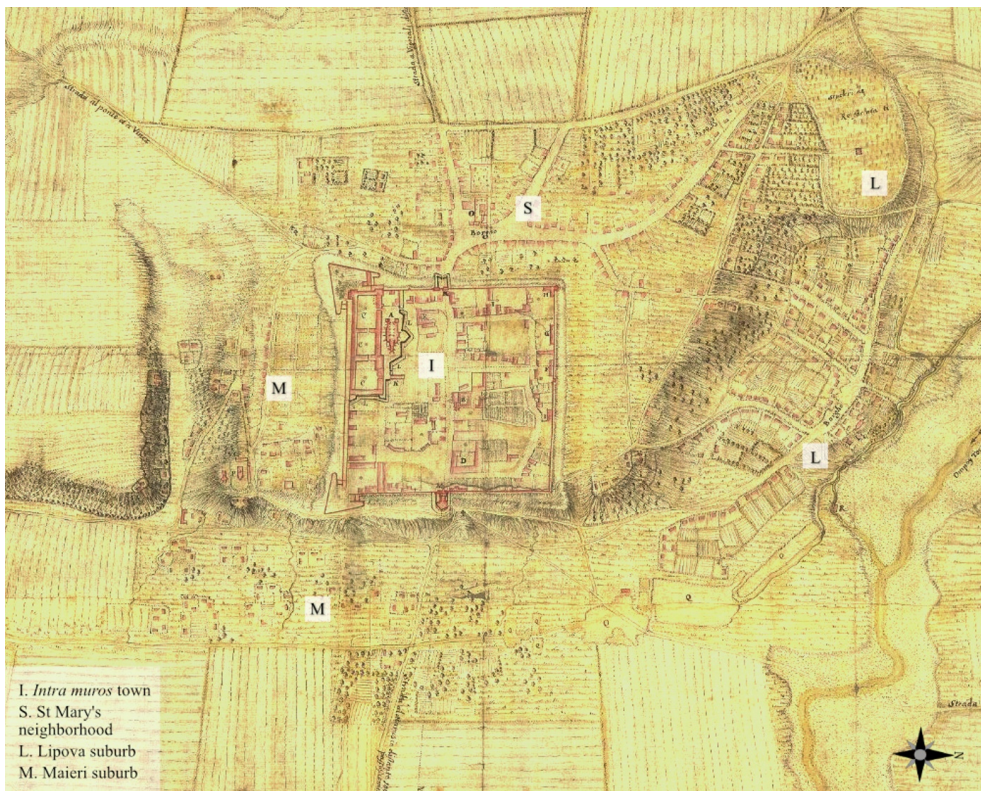


Fig. 4. Alba Iulia in 1711 – plan by Giovanni Morando Visconti
(*Iknografia della Citta d'Alba Iulia*, source: <https://maps.hungaricana.hu>)

The Urban Evolution of the Town of Alba Iulia in the Eighteenth Century

The medieval town of Alba Iulia had developed in close relation with the former *castrum* of the 13th Legion Gemina (Kovács, 2005, p. 236), with people inhabiting both the space inside the walls and that outside. The fortress, in reality the former Roman *castrum* repaired and adapted to the times, had housed the Diocese of Transylvania during medieval times until 1556, when it had been decommissioned²³ against the backdrop of the Reform (Gálfi, 2019, p. 25); later on, the princely court of Alba Iulia had become the capital of the Principality of Transylvania (Anghel, 2021b, pp. 48–51).

The outer town had been built around the fortress on the same terrace²⁴; the inhabited areas from the north and west had been the most widespread and densely populated. As in the fortress, they had also comprised important buildings such as churches with squares in front of them and houses of various sizes, as well as a complex street network, similar to that of a town and connected with the local roads. The main and probably oldest area had been situated to the west of the fortress facing St Mihail gate (Anghel, 1994, p. 292). The district had been dominated by the Church of St Mary, situated near the entrance street to the fortress, past the gate (Gálfi, 2021b, p. 11). Nearby and a bit more to the south had lain the area known as *Cărămidăria* (the brick factory) bordered by Viñului street to the southwest (Anghel, 2021c, p. 128). However, the most densely populated area had been to the north of the fortress where the Lipova suburb had developed. Within its confines, along Șardului, Lipova Mare and Lipova Mică street, there had been numerous houses, one church and two mills. That is most likely where the Macedonian-Romanian (generally known as Greek) merchants had settled, given that in the late seventeenth century a *Greeks' church* is documented to the north of the suburb. To the east and south of the fortress had lain the Maieri (Upper and Lower) suburbs, crossed by Ulița Mică and Mare Românească (Small and Big Romanian Street). In front of the eastern side there had been fewer buildings while the southern area had been dominated by the building complex of the Orthodox Metropolitan Church of Transylvania (fig. 4).

The early eighteenth century saw the emergence of a new stage in the urban evolution of the settlement; after the integration of Transylvania into the Habsburg Empire, the new authorities decided to build a Vauban-style bastion fortification in Alba Iulia to replace the old one (Stanciu, 2021, p. 137). To make room for the new fortress, which was to take up a much larger area and also incorporate a protection area with a width of 200 to 500 m where no buildings could be erected, they had to demolish all the buildings from the outside of the town and move its centre to a new location situated to the east, at the base of the terrace (Fleşer, 2009, p. 71).

The preparations started in 1713 and in this context almost all the buildings were demolished. Their owners received compensation and were provided with land in the new location of the town; however, some did not wish to remain and preferred to move to other towns in Transylvania such as Aiud or Cluj, or even to Banat, where they preferred the town of Caransebeș. Their choice was mainly due to the conditions in the new town centre, which sat on marshy ground that was easily flooded. Nevertheless, constant attention was given to solving these problems, and between 1714 and 1720 a canal was dug on an old secondary branch of the river Ampoi, subsequently named *The Sanitary Canal* (fig. 5 a–b); its aim was to drain the marshes of the central area of the new town.

²³ Although after the secularization of the properties of the Roman Catholic Bishopric, the prince and the court came to possess numerous moveable and unmoveable properties at Alba Iulia, John Sigismund did not wish to make his residence there, but intended to move it at Sebeș, a city located nearby where his father, John Zápolya lived (died). The early death of the young prince prevented the accomplishment of this plan. See Gálfi, 2019, p. 36.

²⁴ Alba Iulia was in the category of towns developed as suburbs surrounding a fortress. See Gálfi, 2019, p. 13.

Gradually, the new settlement came to life, there were squares and a street network, houses were built together with churches and other public buildings and shops were opened. A 1771 blueprint illustrates its outlines and morphology. There was a Hungarian district (*Ungrische Stadt* or *Város*) and a German one (*Teutsche Stadt*) and the Romanian suburb – Lipoveni (*Lippovain* / *Lipoveny Vorstadt*) – was in the northeastern part of the settlement, beyond the river Ampoi (fig. 5 b)²⁵. Such was the structure of the privileged town. The other two suburbs – Maieri and Heiuş – were jointly known as Alba Iulia-Village and were not part of the privileged town. The districts were aligned around two squares; the main streets started in these public spaces and intersected the secondary streets at several points, thus creating a chessboard-like street network (Anghel, 2021d, p. 200).



Fig. 5. Alba Iulia in the eighteenth century: a) in a Josephinian topographic survey, 1769 – 1773 (*Großfürstentum Siebenbürgen* (1769 – 1773) – *First Military Survey*, source: <https://maps.arcanum.com/>); b) in 1771 (source: Dumitran, 2015, p. 8)

The name of the town was also changed from Alba Iulia to Carlsburg/Karlsburg, after Emperor Charles VI during whose reign the fortress was erected and the town centre moved. The change came in response to the request of a local delegation which travelled to Vienna in 1716 and asked the emperor to agree for their town to bear his name (Fleşer, 2006, p. 13). Nonetheless, the new name was only used in the official documents issued by the authorities and the administration, while in their everyday lives the Transylvanians continued to use the old names of the town (Anghel, 2021a, p. 17).

In the nineteenth century, the town was to continue its urban development. Houses, churches and public institutions would be built on the barren plots of land. New streets would appear, some as extensions to existing ones, as the inhabited area extended both to the north and to the south. Towards the end of the century, the width of the protection area around the fortification would be reduced, allowing some development to the west all the way to the left side of the Sanitary Canal. The trend would continue in the first decades of the twentieth century when the built territory would increase even further. In the early 1930s, the town would even closer to the fortress as plots of land were given out for the construction of houses

²⁵ For the integration of the suburbs into the town, please see Dumitran, 2015, pp. 5–25.

in the protected area of the fortress; this project would be initiated by the new authorities and its beneficiaries would be mainly the representatives of the new Romanian elite and their families (Moga, 2021, p. 333). Hence the town would acquire a size and aspect that would preserve for approximately half a century.

The Conclusions. In the eighteenth century, Transylvania's town network revealed its weaknesses. The integration into the Habsburg Empire meant it was also possible to make comparisons also with the towns of the other provinces. A lagging-behind was evident. Transylvania had few towns and boroughs, they were rather small and their economic activity was mainly dominated by guilds more reminiscent of the Middle Ages. And what was not obvious at a first glance was revealed by the fiscal conscriptions repeated throughout the eighteenth century as stages in the efforts made by the new authorities to render tax collection more efficient and thus provide the necessary income for the maintenance of an administrative apparatus which became increasingly heavy and expensive (Ionaș, 1997, pp. 63–72). This image is completed by the numerous concrete data giving an outline of the then-current situation of the towns – number of tax gates, name of owners, material state, value of profits yielded by crafting and merchant activities – and of the debts they had accumulated by delaying the payment of their duties. There were many small towns in this situation in the mid-eighteenth century. The causes were manifold, among them the precariousness of economic activities and the low number of taxpayers. However, these shortcomings were not recent; the evolution of the previous centuries had left its footprint on how the towns evolved, especially the small ones. The economic mechanisms in action here were exacerbated first by violent events, natural calamities and epidemics numerous in the sixteenth and seventeenth centuries, but also by the violence of the early eighteenth century caused by the anti-Habsburg mutiny also known as Rákóczi's War of Independence.

The towns of Sebeș and Alba Iulia, in a difficult situation in the first half of the eighteenth century characterized both by a low level of economic development and partial depopulation, redefined their urban morphology. The first did it by its own initiative as a consequence of efforts made by the local authorities to attract new, German taxpayers to the town; thus they managed to increase the numbers of their population quite considerably while also rebalancing its ethnic structure compared to at the beginning of the century, when it had tipped in favour of Romanians. The building of the *Durlachers'* district and increased size of the *Meyerein* marked significant moments in the reconfiguration of the inhabited area of the town, heralding the evolutions of the next centuries, when the town acquired its present layout.

If we speak of Alba Iulia, the rather radical change of morphology came as a consequence of the decision of the Habsburg authorities which gave the town an important role in their strategy to defend the new borders by building a strong Vauban-type bastion fortification in the place of the medieval fortress and the civil settlement surrounding it. The extreme measure they chose – the demolition of the buildings from the outer town and the relocation of the inhabited area to the east, at the base of the terrace on which the new fortress was to be built – forced the few inhabitants that had remained to start from scratch. In practice, this meant the emergence of a new town which even had a different name as of 1716 – Carlsburg/ Karlsburg – since the *intra muros* space was almost exclusively taken up by the army and the bureaucratic apparatus of the Roman-Catholic Diocese. Once it was set up, based on a pre-established blueprint, the town was endowed with privileges and it became a *free royal town*, continuing its evolution under this statute in the following centuries, too. In the inter-war period it acquired the configuration it was to keep until the start of the systematization works of the communist period.

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*The article was received May 14, 2024.
Article recommended for publishing 29/11/2024.*

UDC 94(477=162.1)“17/18”
DOI 10.24919/2519-058X.33.317461

Bohdan HUD

PhD hab. (History), Professor; Senior Researcher of the Department of the Center for the Study of Ukrainian-Polish Relations, I. Krypiakevych Institute of Ukrainian Studies of the National Academy of Sciences of Ukraine, 4 Kozelnytska Street, Lviv, Ukraine, postal code 79026 (bohdanhud@gmail.com)

ORCID: 0000-0002-6811-2696

Oksana VOZNIUK

PhD (Education), Associate Professor, Professor of the Department of Military History, Hetman Petro Sahaidachny National Academy of Land Forces, 32 Heroiv Maidanu Street, Lviv, Ukraine, postal code 79026 (oksana_w2000@ukr.net)

ORCID: 0000-0002-4186-6113

Богдан ГУДЬ

доктор історичних наук, професор, старший науковий співробітник відділу “Центр дослідження українсько-польських відносин”, Інститут українознавства ім. І. Крип’якевича НАН України, вул. Козельницька, 4, м. Львів, Україна, індекс 79026 (bohdanhud@gmail.com)

Оксана ВОЗНЮК

кандидатка педагогічних наук, доцентка, професорка кафедри воєнної історії, Національна академія сухопутних військ імені гетьмана Петра Сагайдачного, вул. Героїв Майдану, 32, м. Львів, Україна, індекс 79026 (oksana_w2000@ukr.net)

Bibliographic Description of the Article: Hud, B., & Vozniuk, O. (2024). The Poles in Kyiv region, Volyn and Podillia: from the divisions of the Polish-Lithuanian Commonwealth to the January Uprising. *Skhidnoievropeiskyi istorychnyi visnyk [East European Historical Bulletin]*, 33, 27–40. doi: 10.24919/2519-058X.33.317461

**THE POLES IN KYIV REGION, VOLYN AND PODILLIA:
FROM THE DIVISIONS OF THE POLISH-LITHUANIAN COMMONWEALTH
TO THE JANUARY UPRISING**

Abstract. *The purpose of the research is to do a comprehensive analysis of the policy of the Russian Empire concerning the population of Right-Bank Ukraine (nobility, peasantry) in the context of socio-political and military processes at the end of the 18th – mid-19th centuries. The principles of historicism, scientific objectivity, systematicity and comprehensiveness are **the theoretical and methodological foundations** of the research. Such general and special scientific methods of the study as: logical, problem-chronological, historical situational, comparative have been used to solve the objectives. **The scientific novelty** of the research consists in the study of the state authorities role in the settlement/intensification of ethno-social conflicts on the Right-Bank, as well as a comprehensive analysis of the Polish-Ukrainian (noble-peasant) relations at the micro level, the levelling of myths and stereotypes about them, which gave rise to the Polish and Ukrainian historiography during the*

last century. **The Conclusions.** At the end of the 18th century the entry of Right-Bank Ukraine into the Russian Empire did not decrease the influence of the Polish nobility in the region, which was integrated into the power vertical of the Romanov Empire gradually. The factor of “wealthy Polish nobility” and “poor Ukrainian peasantry” determined the priorities of St. Petersburg’s ethno-social policy in the region: the former, *de facto*, received unlimited rights and opportunities, while the latter were granted a disenfranchised status, which naturally contributed to the growth of a social tension in the South-West region and stimulated anti-noble/anti-Polish uprisings. The anti-noble uprisings showed the shaky position of the Russian administration in the region, which was threatened with defeat without the support of the Ukrainian peasantry. In this context, the peasants of Right Bank acted as a kind of guarantor of the nobility’s obedience.

Key words: Russian Empire, Right-Bank Ukraine, Polish-Ukrainian relations, nobility, peasantry, uprising, conflicts.

ПОЛЯКИ НА КИЇВЩИНІ, ВОЛИНІ Й ПОДІЛЛІ: ВІД ПОДІЛІВ РЕЧІ ПОСПОЛИТОЇ ДО СІЧНЕВОГО ПОВСТАННЯ

Анотація. *Мета роботи* полягає у комплексному аналізі політики Російської імперії щодо населення Правобережної України (шляхта, селянство) у контексті суспільно-політичних та військових процесів кінця XVIII – середини XIX ст. **Теоретико-методологічними засадами** дослідження слугували принципи історизму, наукової об’єктивності, системності та всебічності. Для розв’язання поставлених завдань використано такі загально- та спеціальнонаукові методи дослідження, як: логічний, проблемно-хронологічний, історико-ситуаційний, порівняльний. **Наукова новизна** розвідки вбачається у дослідженні ролі органів державної влади в урегулюванні / посиленні етносоціальних конфліктів на Правобережжі, а також закріпленню безправний статус, що, закономірно, сприяло зростанню соціальної напруги в Південно-Західному краї та стимулювало антишляхетські / антипольські виступи. Шляхетські повстання показали хитке становище російської адміністрації у регіоні, якій без підтримки українського селянства загрозувала поразка. У цьому контексті, селяни Правобережжя виступали своєрідним гарантом покірності шляхти.

Ключові слова: Російська імперія, Правобережна Україна, польсько-українські відносини, шляхта, селянство, повстання, конфлікти.

The Problem Statement. In the Ukrainian and Polish historiography, the issue of the Polish presence in Kyiv region, Volyn, and Podillia (the end of the 18th – the mid-19th centuries) is one of the least researched, considering numerous ideological “taboos” that took place in Ukraine and Poland during the communist totalitarianism, and modern subjective factors. Among the Ukrainian researchers, who are mainly influenced by the historical views of Mykhailo Hrushevskyi, the outlined issue was and remains to some extent “foreign”. Instead, according to Krzysztof Pomian, the Poles are aware that “the historical image of the Polish presence in Right-Bank Ukraine (in the 19th century) does not strengthen hearts,” because “heroism is rare” (Beauvois, 1987a, s. 8). Instead, there are numerous unattractive, factual abuses of the Polish nobility against the Russky/Ukrainian serf peasants (Franko, 2020, pp. 13–27), as well as a number of modern Polish scholars try to avoid or even justify the abuses. Perhaps that is why, in the opinion of K. Pomian, none of the Polish

historians have created this image, and the Polish collective memory, as well as the Polish historiography, have not found a place for it (Beauvois, 1987a, p. 8).

The Review of Sources and Recent Research. Daniel Beauvois, a French scholar and follower of the School of Annals (in French: *École des Annales*), was the first historian to study the research issue thoroughly. He devoted a “short Ukrainian trilogy” to the issue of the Polish presence in Right-Bank Ukraine, the relations of Poles with the imperial authorities, the Ukrainians and the Jews, as well as a major synthesis of the issue, numerous articles and interviews (Bovua, 1996, 1998, 2020). Over time, owing to his research, the outlined issue became quite popular both in Poland and Ukraine. The Ukrainian researchers, including Ivan Lisevych (Lisevych, 1993), Valentyna Shandra (Shandra, 1998, 2005), Mykola Barmak (Barmak, 2007), Viktor Pavliuk (Pavliuk, 2000), Bohdan Hud (Hud, 2018) and the others, significantly supplemented the scientific research by D. Beauvois with valuable facts and analytical generalizations. Among Polish historians, the research issues started by the French historian are directly or indirectly studied by Roman Wapiński (Wapiński, 1994), Leszek Zasztowt (Zasztowt, 1997), Dariusz Szpoper (Szpoper, 2003), Tadeusz Epsztein (Epsztein, 1998), Mirosław Ustrzycki (Ustrzycki, 2006) and the others. However, today there are many gaps in the public consciousness of the Ukrainians and the Poles regarding understanding of importance of the above mentioned scientific issue. This, in particular, confirms the fact that on the pages of school textbooks, as well as studies on the history of our countries of the 19th century, there is little information on the issue unreasonably (Plokhii, 2016; Hrytsak, 2019; Yekelchuk, 2009; Zamojski, 2016). The above-mentioned fact prompts to draw the attention of researchers of the history of the Ukrainian-Polish relations in the new and modern times to the issue mentioned in the title of this article.

The purpose of the research is to do a comprehensive analysis of the policy of the Russian Empire concerning the population of Right-Bank Ukraine (nobility, peasantry) in the context of socio-political and military processes at the end of the 18th – mid-19th centuries.

The Results of the Research.

1. The nobility of Right-Bank after the divisions of the Polish-Lithuanian Commonwealth.

In the last quarter of the 18th century Right-bank Ukraine was incorporated by the Russian Empire. In 1796 – 1797, the former territories of the Polish-Lithuanian Commonwealth were divided into three provinces (Kyiv, Podillia, and Volyn). For more than a century, they formed the so-called The South-Western Region, which in turn was part of the Western Region of the Romanov Empire. After the suppression of the November Uprising (1832), the Kyiv Governorate General was established, which was subordinated to the three aforementioned Right-Bank provinces (Barmak, 2007, pp. 158–159, 177). Since then, a qualitatively new stage of imperial policy began, aimed at (a) eliminating the peculiarities of the administrative system, (b) minimizing differences in the social structure of the region, (c) reducing the influence of the regional elite – the Polish nobility.

At the end of the 18th century the change in the vertical of power (from Warsaw to St. Petersburg) almost did not affect the position of the Polish elite of the Right Bank. The Russian government was forced to take into account the experience of the Poles in the system of local self-government, and therefore gave them the majority of positions in the provincial and district institutions. Catherine II extended to the local nobility the status and corporate privileges of the Russian nobility, defined by “The Charter to the Nobility” (1785), confirming the rights of landowners to the land that remained in their possession, together with serf “souls” (Kappeler, 2000, p. 65). However, after the defeat of the Kościuszko

Uprising (1794), the Russian government confiscated and handed over to the treasury the estates of active rebels, and sequestration (restrictions on the use and disposal of property) was imposed on the property of people suspected of aiding the rebels. However, the Polish landowners normalized their relations with the Russian authorities very quickly, swearing loyalty to the tsarist dynasty.

Paul I, after coming to the throne (1796), ordered the release from exile and imprisonment of several thousand participants of the Kościuszko Uprising, returned to the Polish nobility the estates previously taken, and restored the Catholic and Uniate dioceses. Polish “citizens” of Kyiv region, Volyn and Podillia were given the right to gather at local sejms and elect provincial and district marshals (leaders), judges, etc. The next step of Paul I was the decree of the Senate dated December 12, 1796, according to which Right-Bank provinces received a number of privileges, which legitimized their special position in the Russian Empire (for example, the Lithuanian Statute continued to apply in the region until 1840) (Shandra, 2005, p. 20).

However, the Polish nobility lost the guarantee of personal freedom, property inviolability and political rights (Dylałowa, 2000, s. 14). However, all this was compensated by its influence on various levels of the imperial administrative “ladder”. As the lawyer and publicist of that time Kaytan Koźmian wrote, “rights, institutions, national traditions, customs have been preserved”, and the Poles are “government officials in the Russian Senate, sometimes governors, higher and lower officials in city courts, etc.” (Koźmian, 1972, p. 272). What’s more, the conviction prevailed among the Volyn nobility: “We are now even better than it was in Poland: we have everything that the motherland gave us, but we do not have obligations and the danger of the Uman massacre; and although without Poland, we are in Poland and remain the Poles” (Koźmian, 1972, p. 274).

According to some Polish authors, this state of affairs could indicate that “with the consent of the Russian government, southern Russia [Right-Bank Ukraine – authors] belonged to the sphere of influence of the Polish civilization” (Giertych, 1986, p. 297). In the first half of the 19th century, a significant number of representatives of the Polish/Polish nobility, led by magnates, lived in the region. At the same time, the mass of the Russky/Ukrainian peasantry, without a clear national/ethnic identity, was much more numerous. According to D. Beauvois, the population of Volyn, Podillia, and Kyiv regions numbered more than 3.3 million people, of whom the Poles made up 7–8% (in some districts of Volyn – 13–14%) (more than 400,000 people), the Jews – approx. 10%. The rest (80%) – “the Orthodox”, i.e. the Ukrainians and the Russians. In 1840, the total number of Right Bank residents increased by 1 million people approximately. Of them approx. 3 million were under the direct servitude of the Polish landowners (Bovua, 2020, pp. 44–45).

The top of the landowner/magnate “iceberg” was made up of representatives of wealthy families – the Czartoryscy, the Branicy, the Potoccy, the Rzewuscy, the Sanguszki, the Sobańscy and the others. They, as well as numerous Roman Catholic monasteries and churches, owned from 4 to 6 million acres of land, i.e. 90% of all private land, together with serf “souls”. The group of large landowners was not too numerous – on Right Bank only approx. 6 000 Poles owned capital, which, according to the figurative expression of D. Beauvois, “gave shine to their noble origin” (Hud, 2018, p. 140; Epsztein, 1997, p. 70). However, their opportunities were enormous, as were their estates, which in their area often exceeded individual principalities in Italy or Germany. The Volyn magnates even owned towns – Novohrad-Volynskyi, Starokonstantyniv, Ostrih, Zaslav, Dubno, Rivne, etc. (Dokumenty i materiały, 1962, pp. 233, 239; Bovua, 1996, p. 69; Giertych, 1986, p. 13).

In total, 80% of the territory of Right Bank was owned by 40 magnate families (Subtelnyi, 1991, p. 173).

However, the vast majority of Right Bank nobility gentry was the “aristocratic nobility” (“aristocratic proletariat”) – the gentry of the estates, czynszowa gentry, etc. There were representatives of this ethno-social group approx. 350 000 on Right Bank. Robert Howard Lord wrote that these were people who “either had no land at all, or were unable to make two ends meet cultivating that land. Poor, ragged, dirty, living like peasants, or even worse, they were still full of caste pride...” (Giertych, 1986, s. 14). It was the petty nobility that created the majority of problems for St. Petersburg, since they formed “the type of society in which mobility prevailed, in which the individual was not subject to any control by the government, but continued to live as if there were no divisions [of the Polish-Lithuanian Commonwealth – authors], without any obligations towards the Russian government, and even on the contrary – sowing enmity towards it... All this was intolerable for the Tsar” (Beauvois, 1987b, p. 76).

2. Peasants and Nobility.

The change in state ownership of Right Bank territories practically did not affect the situation of the local peasantry. According to M. Kostomarov, it continued to suffer under the terrible tyranny of “possessors and commissars”, who “tortured mercilessly and ripped off the peasants” (Kostomarov, 1870, pp. 131–132). As modern Polish historians admit, in the 19th century the widely practiced system of corporal punishment created an “endless school of savagery and cruelty”, due to which the fate of the peasant-serf, who was “in a state of the most severe slavery..., became unbearable” (Jędrzejewicz, 1970, p. 16; Filar, 2002, p. 350; Franko, 2020, pp. 13–27).

What’s more, after the arrival of the Russians, the situation of the peasantry worsened. Having equalized the local Polish nobility in rights and privileges with the Russian nobility, the imperial government transferred the serf “souls” to its full ownership, including the right to sell a peasant or exchange him for property. The nobility also received the right to send unruly peasants to hard labour in Siberia (Hurzhii, 1954, p. 23; Tarnowski, 2002, p. 30). Numerous documents are preserved in the Ukrainian archives, which testify to the true sadism of the Polish landlords towards their subjects. As P. Jasienica emphasized with bitter irony, “a landlord had very broad powers in relation to his “souls”... Capture, imprisonment, shackles or wooden blocks called *dyby* were commonplace. ...Didych gave orders for corporal punishment. The severity of punishment depended on a landlord. The law put forward only one limitation in this case, and it was interpreted very “liberally”: you can beat, so as not to kill” (Jasienica, 1992, p. 86).

However, some Polish contemporaries tried to shift the blame for landlords’ abuse of peasants onto the Russian government. According to them, a landlord actually “supported and justified” the existing state of relations in a serf village on the Right Bank. Under such conditions, “even angels ... would turn into devils” (Rok 1863 na Ukrainie, 1979, p. 21). F. Rawita-Gawroński agreed with the views of an unknown participant of the January Uprising, who also placed responsibility on the tsarist autocracy. “The relations of subject dependence of a peasant... have been deteriorating since the Russian occupation of the Russky provinces”, (Rawita-Gawroński, 1902, p. 17). These statements, however, do not correspond to the historical truth. The Polish liberal August Iwański senior admitted with regret that in the first half of the 19th century it was the Russian government that “had to limit and regulate the size of *panshcynna* demanded by landowners” (August Iwański senior, 1968, p. 20; Kraszewski, 1985, p. 142).

As in the 17th and 18th centuries, peasants of Kyiv region, Volyn and Podillia responded to the unbearable oppression with rebellions, riots and other manifestations of disobedience, the number of which significantly exceeded similar indicators on Left Bank. The most striking example is the peasant movement led by Ustym Karmaliuk, which lasted almost a quarter of a century (1813 – 1835). Its centre became Letychiv district in Podilla. In total, about 20,000 peasants and deserters from the tsarist army were members of Karmaliuk's units. After the death of the leader, more than 2,700 peasants, former members of the rebel groups, were brought to court. It is symptomatic that during the period of insurgent units activity, landowners treated peasants much more liberally (Hurzhii, 1958, pp. 20–21; Jędrzejewicz, 1970, p. 62).

The new rulers of Right-Bank Ukraine noticed a sharp ethno-social conflict between the peasants and the nobility quickly. To strengthen their rule, they resorted to the proven principle of the Roman Empire for centuries: “divide et impera”. As it is known, the “wildest forms of dependence and panshchyna” also reigned in the Russian provinces (Rawita-Gawroński, 1903, p. 17; Dostoevskiy, 1958, pp. 304–305). In these wildest forms, the Russian and Polish landowners differed little from each other. However, there was a very important difference between Russia proper and Right-Bank Ukraine. It consisted in the extent of the landlords' power over peasants. The relevant statistics is striking: in the Russian Empire, the share of serfs among the total peasantry was only 14.6%, in Ukraine – 59.5% in total, in Left-Bank, the number of landowner peasants was 38%, and in Southern Ukraine – only 25% of the total peasantry. On the other hand, in the former territories of the Polish-Lithuanian Commonwealth, this percentage was the following: in Volyn – 78.5%, in Kyiv region – 83.8%, in Podillia – 87% (Pashuk, 2001, pp. 13, 18; Veryha, 1996, p. 90). Thus, during the period under study, the struggle between the Russians and the Poles broke out on the territories of Right-Bank Ukraine, newly annexed to Russia, in which “the Ukrainian souls” were at stake. “Souls” not in the sense of performers of forced labour, but souls in the literal sense, who had to be torn out from under the influence of Polish landowners and “transformed” into loyal subjects of the “Orthodox tsar” (Bovua, 1996, p. 76; Miller, 2000, p. 174).

For this purpose, the Russian administration of the South-Western region deceptively pretended to be defenders of the Ukrainian people against the violence of Polish landlords and defenders of the Orthodox faith against the influence of the Roman Catholic Church (Bovua, 1998, p. 82). The policy of “divide and conquer” was consistently and effectively pursued by the tsarist government until the outbreak of World War I. As a result, the public atmosphere of Right-Bank can be compared to a “time bomb”, whose explosive potential the Russian government (according to the situation) either decisively neutralized, pacifying the anti-landlord protests of peasants, or partially put them into action, inciting the latter against noble revolutionaries, as was the case during periods of the Polish national uprisings.

3. From November of 1830 to January of 1863

For the first time, the principle of “divide et impera” was applied after the beginning of the November Uprising of 1830. Without any doubt, the noble revolutionaries were aware of the crucial importance of the support of the Ukrainian peasantry for the success of their movement on the so-called territories of the former Polish-Lithuanian Commonwealth, so they tried to sway the Ukrainian peasantry to their side. For this purpose, they, for example, distributed “Instructions for Teachers of the Rusky People”; sent to the so-called province “Rusky letters”, as well as numerous appeals written in the “Rusky” language of the time (but in Latin letters), which called on the local common people to anti-Russian uprisings (Sosnovskiy, 1974, p. 31; Kozak, 1993, p. 138; Reient, 2003, p. 79). However, in general,

the Poles were convinced that they would involve the serf peasants in the struggle for the independence of Poland by the power of their own influence (Buława, 2004, pp. 176–177). This belief can be observed in the writings of one of the leading ideologists and the most active participants in the uprising, Mauritsii Mochnacki. “*The Polish citizens*”, he wrote, “make up Poland there [in Rus – *authors*]. They can lead all...humanity behind them... because the peasant will follow...the one who exerts greater influence on him – the master, the Polish citizen” (Mochnacki, 1984, pp. 456–457).

Such a simplified analysis of the moods and sympathies of the peasantry in Kyiv region, Volyn and Podillia, which could choose at least the “lesser evil” between the two, was one of the main mistakes of the leaders of the Polish national movement, the consequences of which were not long in coming. The Russian administration of the South-West Region was aware that the peasants oppressed by the Polish magnates could become an ally of St. Petersburg in the fight against the nobility’s uprising. In order to encourage them to do this, the commander-in-chief of the Russian troops on Right-Bank, Field Marshal Fabian Gottlieb von der Osten-Sacken, issued a summons to the peasants of the South-Western Region on May 19, 1831, which ran: “Loyal subjects! We inform you that the rebels are deceiving you... Do not believe them... You will never again belong to those landlords who rebelled against the legitimate government” (Kieniewicz, Zahorski & Zajewski, 1992, p. 214; Selianskyi rukh na Ukraini, 1985, p. 12). Austen-Saken’s appeal was read by the Orthodox clergy in all the churches of the region, and the peasantry responded to it with enthusiasm: in the peasantry’s mind, the “good Orthodox monarch” was the guardian and benefactor of people, and the enemy was a bad landlord / Catholic / liakh.

As a result, the peasants ignored the Polish rebels’ requests for help, and often even opposed them. In Podillia, the serfs of the Sobansky counts reported to the authorities on the rebels. The same thing happened in Radomyshl and Kremenets poviats in Kyiv region and Volyn. The peasants refused to hide the rebels, provided them with false information about roads and crossings, seized noblemen and handed over them to the Russian troops, even those who were not involved in the uprising. In the atmosphere of fighting the “master’s war”, there were attacks by peasants on the estates in Bratslav and Baltsky poviats of Podillia province (Powstanie listopadowe, 2015, p. 423; Buława, 2004, p. 182).

M. Mochnacki explained a passive and even negative attitude of the Ukrainian peasantry towards the November Uprising by its “darkness and crowding”, as well as the influence of Orthodox priests on the local population, who seemed to paralyze the “efforts of good citizens” (Mochnacki, 1984, p. 473). However, the more real reason for the anti-Polish position of the Ukrainian peasants was, in our opinion, their slave status, which made them hostile towards the rebels, as well as aspiration to obtain “land and freedom” and the memory of the Haidamat movement, which was passed on to children and grandchildren from the still living witnesses of Koliyivshchyna (Spohady pro Tarasa Shevchenka, 1982, p. 24; Buława, 2004, p. 173).

The period between the uprisings of 1830 and 1863 gave the Polish side time to understand the reasons for the defeat and to formulate certain conclusions based on the fact of the indifferent or even hostile attitude of the “Russky” population of the South-Western region to the “noble revolution”. The bitter lesson prompted a number of figures of the “Great Emigration” and individual Polish writers of the so-called “Ukrainian school” to revise traditional approaches regarding the nature of relations with the Ukrainian people. Severyn Goszczynski and noble revolutionaries Leopold Kowalski, Jan Krynski, and the others from

the “Gromada Humań” Community, which was part of the “Polish People in Emigration” organization, expressed, in particular, “deep repentance” for the wrongs inflicted on the Ukrainian people and set the goal of creating a “fraternal union of neighbouring nations” (Janion & Żmigrodzka, 1978, p. 115).

However, despite the attempts of individual figures of the Polish liberation movement to improve the situation, the nature of social relations in Volyn, Kyiv region and Podillia in the plane of “a lord – a serf”/ a Pole – a Ukrainian did not undergo significant changes in the 40s and 50s of the 19th century. One of the main reasons for this state of affairs was, in particular, the fact that after the suppression of the uprising, the Russian government did not direct repression against the Polish landowning elite in general, as this could threaten the existence of the entire feudal system. Only those who fought against the Russian army with weapons in their hands or were suspected of helping the rebels (mainly representatives of the small-scale nobility) were persecuted. In the 1830s and 1840s, several hundred thousand of its mass were deprived of noble rights and privileges and transferred to the category of peasants (Hud, 2018, pp. 140–141).

At the same time, contrary to the claims of individual Polish authors, the scale of repression against large Polish estates was dramatic in Kyiv region, Volyn and Podillia. However, on December 21, 1830, Emperor Nicholas I signed a decree stating that “properties of violators of the duty of loyalty, who join the ranks of the enemies of the State, are subject to confiscation”. Also, on May 6, 1831, the emperor signed a decree imposing a sequestration on the estates of people of the Polish origin who participated in the uprising. Therefore, some landowners, in particular in Volyn, were confiscated part of their estates and serf peasants, who were transferred to the category of state peasants. In 1837, in Kyiv and Podillia provinces on lands, confiscated from the participants of the uprising, the so-called “military settlements” (Luhovyi, 2009, pp. 11–12). Nevertheless, the majority of the nobles in various ways managed to regain their sequestered estates and confiscated valuables, therefore, after 1831, the ratio of Polish and non-Polish land ownership in South-West Region did not change fundamentally (Barmaka, 2007, pp. 289–290).

The position of the serf peasants did not change either. After the suppression of the November Uprising, the landowners put their class interests first, and the tsarist administration was indifferent to the promises made to the peasants. The Russians and the Poles agreed on the return to the current system very quickly – the status quo ante, the positions of which were slightly shaken due to the events caused by the uprising movement. That is why, the “careless”, according to the expression of the governor-general D. Bibikov, the promises to the peasants given by Austen-Saken remained “on paper”. Of all the serfs who helped the authorities, only Semen Burdeliuk from Volyn was “free” for denunciation of his rebel-master (Bovua, 1996, pp. 73–74). The others were forced to return under the rule of the landlords, who “took revenge ... on the peasants who listened to the appeals of Fabian Austen-Saken and cooperated with the government ... and helped to suppress the uprising. The government did not protect them at all from the revenge of the masters. The situation of the peasants became even worse than it had been before the uprising, and they... fled to the south of Ukraine to Kherson and Tavriia provinces” (Lavrov, 1940, p. 108).

The imperial authorities’ attempts to keep the feudal system intact threatened, however, undermining its authority in the peasant environment. Therefore, a few years after the suppression of the uprising, the Russian government dared to take a step that allowed it to “preserve a good physiognomy for a bad game”: in May of 1847, on the initiative of

D. Bibikov, the so-called “Law on Inventory”, amended on December 26, 1848 (Veryha, 1996, p. 92). The law normalized the relationship of serf peasants with landowners, slightly increased the total area of peasant allotments, and reduced the lordship to three days a week. In addition, the nobles had no authority and were forbidden to send peasants to recruits or send them to Siberia, to interfere in private lives of their subjects, to punish them without a court verdict, etc. (Polonska-Vasylenko, 1995, p. 302). Of course, the tsar resorted to regulating the serf system on Right-Bank with the sole purpose of limiting the Polish influence. The main task of the inventory reform was to strengthen the pro-anarchist sentiments of the Ukrainian peasantry and reduce the scale of anti-serf movements, the suppression of which cost St. Petersburg considerable effort and expense (Leshchenko, 1963, p. 8).

In general, the inventory reform somewhat eased the situation of the peasants, but in 1855 the Polish landowners managed to suspend its effect finally (Bundak, 1999, p. 9). After that, serf oppression on Right-Bank intensified again, and antagonisms between peasants and landowners intensified as well. The Polish memoirist of that time wrote bitterly: “The landowners and the village are completely alien worlds to each other, today, in particular, they are divided by a terrible chasm dug out owing to government orders, religion and indifference of the Poles. Although once they had fabulous profits from the peasantry, there was not even such a connection between the owner and his (serf) “soul” as between the owner and the thing, the owner and the horse. Horses, sheep, cattle were taken care of, stables were built for them, but people were punished and beaten” (Matlakowski, 1991, pp. 260–261).

The sharpness of contradictions between the “Russky” plebs and the Polish elite on Right-Bank was especially vividly manifested in the last years of the existence of serfdom in the Russian Empire. Emperor Alexander II initiated the process of modernization of the Russian Empire, which was later called the “revolution from above”. It was designed to change the way of life of the Russian nobility fundamentally, including the Polish landowners of the southwestern provinces. The main component of the planned reforms was to eliminate serfdom in the countryside. Characteristically, the vast majority of Polish landowners were very hostile to the idea of reform, because they “saw in this their collapse and the loss of Rus for Poland forever”. For this point of view they were criticized in the printed organ of the Hotel Lamber “Wiadomości Polskie” more than once (Rok 1863 na Ukrainie, 1979, p. 18; Kieniewicz, 1986, pp. 769–770).

The Tsar Manifesto of February 19, 1861 caused a sharply negative reaction from the majority of Polish landowners on the Right-Bank. They declared it “harmful and premature”. Some of them even resisted the authorities’ attempts to convey the content of the Manifesto to the peasants (Poyda, 1960, p. 121). The imperial power once again took advantage of this. And although the reform developed by the government focused primarily on the interests of large landowners, without introducing the changes desired by the peasants, the government continued to play the role of the peasantry’s defender, contributing to the spread of anti-landlord, and therefore anti-Polish, rumors that “in the Great Russian provinces, the peasants were freed and were given plots of land in their possession, ... and here the lords changed it” (Poyda, 1960, p. 122).

Thus, on the eve of the January Uprising, the Ukrainian-Polish conflict reached another peak. Only in 1861 – 1863 in Kyiv region, Volyn and Podillia there were recorded 1150 anti-landlord uprisings approximately. The exceptional level of a social tension on the Right-Bank is also evidenced by the fact that 70% of the villages that responded to the predatory nature of the reform with riots and uprisings were located in these areas, and the share of villagers

who took part in the riots was 33% of the total population. In 412 cases, the army and police were used to restore order at the request of landowners (Bardach, 1994, p. 328).

The consequences of using “arguments of force” in the Polish-Ukrainian relations were very harmful to the Polish national cause, which some representatives of the “Ukrainian” nobility were aware of. In particular, in the summer of 1862, E. Moszynski angrily chastised his compatriots for putting their private selfish interests above national interests: “I believe that all those who sent the army against the people should be treated as traitors, because perhaps this is what they finally extinguished the sympathy of the peasants for our issue” (Bovua, 1996, p. 130). A little later, the author of “1863 in Ukraine” actually confirmed the validity of E. Moszynski’s words: “The peasants saw that the army was deployed, and their brothers were forced to work being beaten with whips, and this was done by the Poles, who promoted their freedom, so the heads of those ordinary children of nature could not contain so many contradictions... There weren’t many of them among the rebels” (Rok 1863 na Ukrainie, 1979, pp. 29–30).

The Conclusions. The course of the January Uprising showed that, just like thirty years ago, the ambitious intentions of the noble revolutionaries to revive the Polish-Lithuanian Commonwealth within the borders of 1772 were foreign to the peasants. They equated Poland with masters and serf oppression, and this further distanced them from the generally progressive, inherently anti-imperial intentions of the Warsaw insurgents. As the civilian governor of Podillia, R. Braunschweig, wrote in his report dated June 4, 1861, to the Minister of Internal Affairs, P. Valuyev, the local population, which consists of “a tribe related to the Russians by origin and faith”, did not tolerate the Poles, and was “even hostile” (Miller, 2000, p. 138). In view of this, M. Drahomanov believed that in those days the peasantry could take an active part only in anti-feudal action, as, for example, in Western Galicia in 1846. However, even the most “red” leaders of the Polish democratic movement did not dare to come up with such a radical concept. Therefore, the vast majority of the peasants of Right-Bank Ukraine were either passive regarding the hopeless struggle of the Poles, or assisted the Russian authorities in suppressing the January Uprising actively.

Acknowledgements. We express sincere gratitude to all members of the editorial board for consultations provided during the preparation of the article for publishing.

Funding. The authors received no financial support for the research, authorship, and/or publication of this article.

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*The article was received March 03, 2024.
Article recommended for publishing 29/11/2024.*

UDC 929.52(477.83/.86)“17/18”
DOI 10.24919/2519-058X.33.317472

Lesia SMUTOK

PhD (History), Associate Professor of Department of World History and Special Historical Disciplines, Drohobych Ivan Franko State Pedagogical University, 24 Ivan Franko Street, Drohobych, Ukraine, postal code 82100, (smutokigor@gmail.com)

ORCID: 0000-0001-8918-2258

Yaroslav LYSEYKO

PhD (History), Associate Professor of Department of History, Museum Studies and Cultural Heritage of Lviv Polytechnic National University, 5 (4) Mytropolyta Andreia Street, Ukraine, postal code 79016, (lyseyko@gmail.com)

ORCID: 0000-0003-3404-7221

Леся СМУТОК

кандидатка історичних наук, доцентка кафедри всесвітньої історії та спеціальних історичних дисциплін, Дрогобицький державний педагогічний університет імені Івана Франка, вул. Івана Франка, 24, м. Дрогоби́ч, Україна, індекс 82100 (smutoklesia@gmail.com)

Ярослав ЛИСЕЙКО

кандидат історичних наук, доцент кафедри історії, музеєзнавства і культурної спадщини, Національний університет “Львівська політехніка”, вул. Митрополита Андрія, 5, 4-корпус, м. Львів, Україна, індекс 79016 (lyseyko@gmail.com)

Bibliographic Description of the Article: Smutok, L., & Lyseyko, Ya. (2024). Sources on the History and Genealogy of the Galician Nobility (the end of the 18th – the first half of the 19th century). *Skhidnoievropeiskyi istorychnyi visnyk [East European Historical Bulletin]*, 33, 41–50. doi: 10.24919/2519-058X.33.317472

**SOURCES ON THE HISTORY AND GENEALOGY OF THE GALICIAN NOBILITY
(the end of the 18th – the first half of the 19th century)**

Abstract. *The purpose of the research is to conduct a review and analysis of documents related to the history and genealogy of the Galician nobility at the end of the 18th – the first half of the 19th century; to do the research on their source science potential, preservation state. The methodology of the research is based on the principles of historicism, scientific research, verification, as well as the use of general scientific (analysis, synthesis, generalization) and special historical (prosopographic, historical typological, historical systemic) methods. The scientific novelty consists in the fact that a comprehensive analysis on the sources of history and genealogy of the Galician nobility of the Austrian era has been carried out. It has been sufficiently clarified which archinmical collections and gatherings have informative and original documentary material about the nobility of Galicia. There have been revealed numerous aspects of the potential use of these documents in scientific studies. The Conclusions.* Documents on the history and genealogy of the Galician nobility of the end of the 18th – the first half of the 19th century consist of several complexes. The first complex includes documents, which were created in the process of ennobling the nobility. These are the legitimations, the

Nobility Certificates that are in the form of copies, recorded in the so-called nobility metrics. These are the documents of the Department of States, consisting of several thousand cases, grouped by individual families and individuals, which included preparatory documentation that preceded the issuance of identification cards and the Nobility Certificates. The second complex comprises the documents of Lviv Noble Court, represented by almost 50,000 cases. These are the documents of a judicial and property nature, which revealed the material aspects of life of the nobility and cover a significant part of it. Another set of documents – the Krajeva (Regional) Tabula Acts, which reflected the history of land circulation in Galicia, generally of the Dominican Nobility, but partly also of free nobility. One more documentary complex was formed by the metrical books of the Greek-Catholic and the Roman-Catholic churches, which allowed us to reconstruct genealogy of the nobility and certain aspects of its social evolution on the example of individual families and individuals.

Key words: Galician nobility, sources on the history of the Galician nobility, Ennoblement, Lviv Nobility Court, Krajeva (Regional) tabula, church metrics.

ДЖЕРЕЛА ДО ІСТОРІЇ ТА ГЕНЕАЛОГІЇ ШЛЯХТИ ГАЛИЧИНИ КІНЦЯ XVIII – ПЕРШОЇ ПОЛОВИНИ XIX ст.

Анотація. Мета дослідження – здійснити огляд і аналіз документів до історії та генеалогії шляхти Галичини кінця XVIII – першої половини XIX ст. Оцінити їхній джерелознавчий потенціал, стан збереженості. **Методологія дослідження** базується на принципах історизму, науковості, верифікації, а також на використанні загальнонаукових (аналіз, синтез, узагальнення) та спеціально-історичних (просопографічний, історико-типологічний, історико-системний) методів. **Наукова новизна:** здійснений комплексний аналіз джерел до історії та генеалогії шляхти Галичини австрійської доби. З'ясовано, які саме архівні колекції та зібрання містять достатньо інформативний і оригінальний документальний матеріал про nobilitatem Галичини. Розкрито різні аспекти потенційного використання цих документів у наукових студіях. **Висновки.** Документи до історії і генеалогії шляхти Галичини кінця XVIII – першої половини XIX ст. складаються із кількох комплексів. Перший – документи, створені у процесі nobilitації шляхти. Це легітимації, сертифікати шляхетства, які дійшли до нас у вигляді копій, записані до так званих шляхетських метрик. Також це документи Відділу станів, що складаються з кількох тисяч справ, згрупованих по окремих родинах та особах, які містять підготовчу документацію, що передувала виданню легітимацій і сертифікатів шляхетства. Другий комплекс – документи Львівського шляхетського суду, представлені майже 50-ма тисячами справ. Це документи судового і майнового характеру, які розкривають матеріальні аспекти життєдіяльності шляхти і охоплюють значну її частину. Ще один комплекс документів – акти Красвої табулі, які віддзеркалюють історію земельного обігу Галичини, загалом домінальної шляхти, але почасти й вільної шляхти. Ще один документальний комплекс формують метричні книги греко-католицької і римо-католицької церков, які дають змогу реконструювати генеалогію шляхти окремі аспекти її соціальної еволюції на прикладі окремо взятих родин та осіб.

Ключові слова: шляхта Галичини, джерела до історії шляхти Галичини, Nobilitація, львівський шляхетський суд, краєва табуля, церковні метрики.

The Problem Statement. Studies on the history and genealogy of the Galician nobility of the end of the 18th – the first half of the 19th century require a preliminary detailed study of the source base. The source base is quite voluminous and diverse, because this period includes the growth and complication of the government institutions document flow in Galicia, the formation of a new management system in the centre and localities, the growth of bureaucracy and administrative contour development. If during the previous historical era a researcher has to deal with the documents of the Grodskyi and Zemskyi Courts and two or three secondary institutions, then during the Austrian era, a qualitative and quantitative composition of the documentation changed significantly. Some documents, such as metric books, were known to the researchers in general. There are significant arrays of archival

material of other institutions, which weren't used in academic studies systematically and fully. Hence, it is quite natural to try to analyze the source scientific potential of these documents and find out what aspects of the nobility's life they allow to reveal and highlight.

The Review of Recent Research and Publications. The above-mentioned issues were covered in the studies by the historians who did the researches on the nobility issues of the Austrian era. Krzysztof Ślusarek, the Polish historian wrote a monograph on the small nobility of Galicia of the end of the 18th – the first half of the 19th century. In the introductory part he made an overview of the sources that he managed to use in the study on this issue. It is rather laconic, but meaningful (Ślusarek, 1994, pp. 8–10). Liubov Slyvka, the Ukrainian researcher, who also covered the small nobility issues of Prykarpattia during the Austrian era, also made a review of the sources she used in the introductory part. However, her research is of a distinctly ethnological nature. Hence, there dominated oral and material monuments among the sources which the researcher used (Slyvka, 2009, pp. 3–5). Ihor Smutok, Lesia Smutok, and Yaroslav Lyseyko did the studies on the above-mentioned issues, in particular, researching the history of the nobilitation process and the history of certain administrative and judicial institutions (Smutok, Lyseyko & Smutok, 2020; Smutok & Lyseyko, 2019; Smutok & Smutok, 2016). In general, there is no complete comprehensive review and analysis of sources for the history and genealogy of the Galician nobility at the end of the 18th – the first half of the 19th century.

The purpose of the research is to conduct a review and analysis of documents related to the history and genealogy of the Galician nobility at the end of the 18th – the first half of the 19th century; to do research on their source science potential, preservation state.

The Results of the Research. There were represented numerous sources on the history and genealogy of the Galician nobility by several archival complexes, which were formed as a result of various government and church institutions activities that operated on the territory of Galicia during the Austrian era. One of the source is the material of confirming the nobility.

There was an urgent issue regarding incorporating the former nobility of the Polish-Lithuanian Commonwealth into the Austrian nobility after Galicia's accession to the Austrian Empire. A successful resolution of this issue required appropriate regulatory and legal regulation. The process took place in several stages. At first, the so-called Commission of Magnates was established, which was supposed to consider all cases and issues appropriate confirmations. However, it soon became clear that the Commission was unable to cope with the issue. During the period of its activity (1776 – 1783), the Commission considered only a few dozen cases and issued less than a hundred relevant confirmations. Hence, the Zemskyi and Grodskyi Courts received the right to confirm nobility in 1782, which had operated on the territory of Galicia since the time of the former Polish-Lithuanian Commonwealth. The task given to the Zemskyi and Grodskyi Courts was fulfilled in 1782 (Smutok & Smutok, 2016, pp. 5–12; Smutok & Lyseyko, 2019, pp. 65–68).

In 1786, the right to confirm nobility was granted to the State Committee, or the States Department, which began operating in 1782. Since 1789, the States Department had taken over the cases of confirming nobility status completely. The process of issuing legitimations carried on until 1817. The process of confirming nobility with the help of the State Department ceased on March 5, 1817. Only the Emperor granted the corresponding status by a special patent since that time. The corresponding documents were prepared in the Court Chancellery in Vienna. This procedure was preserved until the end of the Austrian Empire existence (Smutok & Lyseyko, 2019, pp. 68–70).

However, the States Department retained the right to consider cases related to the confirmation of nobility to the descendants of the legitimized nobility. The States Department issued the so-called Nobility Certificate in case of a successful procedure (Smutok & Smutok, 2020, pp. 4–10).

The result of the activities of these institutions was the creation of a documentary complex, the major part of which was formed in the States Department. The documentary complex ended up in the Krayevyi (Regional) Committee after certain administrative perturbations. Nowadays it is stored in the Central State Historical Archive in Lviv in Fund 65, Description 3 and Description 6a. These are, first of all, the so-called nobility metrics or, in other words, the mayestatic books. These are 28 books, in which the legitimations and the Nobility Certificates were recorded. The legitimations are recorded in the first two dozen books, and the Nobility Certificates – in the last five books. It is due to the fact that they were recorded in a chronological order, respectively, the last 5 books cover the period when the legitimations were no longer issued, and instead the Nobility Certificates were issued (since 1817) (CSHAUL, f. 165, d. 6a, c. 19–46).

The legitimation, i.e. a document confirming the nobility status, was issued either to a single person or a family represented by brothers, uncles, nephews, etc. In rare cases, these could be female representatives, who were mentioned alongside brothers or fathers. The legitimation could also be issued to the representatives of the same dynasty, who were in rather distant relations with each other, but lived in the same village, usually a noble family settlement. For example, one legitimation was received by the Vysochanski Minkovychi, the Vysochanski Petrushevychi, the Vysochanski Dmytrykovychi. They all lived in Vysotske Verkhnie (CSHAUL, f. 165, d. 6a, c. 31, pp. 191–194). The same may be said about the Matkivski Budzevychi, the Matkivski Konturovychi, the Matkivski Bardzeyovychi, the Matkivski Chuchepkovychi, and the Matkivski Kapreyovychi, they received one document for all (CSHAUL, f. 165, d. 6a, c. 24, pp. 249–254). They all lived in the village of Mokhnate. There are cases when the legitimation was issued to different families living in one nobility settlement. As a rule, this concerned the petty nobility of the Carpathian region. Hence, there are legitimations in which the surnames the Ilnytski Telepianovychi, the Ilnytski Cherchovychi, the Komarnytski Tatarynovychi, the Matkivski Shypovychi, the Matkivski Kobilnevychi are written next to each other. They all lived in the villages of Matkiv and Ivashkivtsi (CSHAUL, f. 165, d. 6a, c. 33, pp. 187–191). A similar situation concerns the following families: the Vinnytski and the Krynytsia from the village of Krynytsia; the Krynytski Iliashevychi, the Rozhniativski from the village of Kavske (CSHAUL, f. 165, d. 6a, c. 20, pp. 304–305).

There was a certain form according to which the legitimation was drawn up. Its content was quite typical and contained the following components: a proper name and surname of a person receiving legitimation; if there was a nickname, it was also indicated; information about positions, ranks, titles was added as well; if a person was of a clerical status, this was outlined by an appropriate predicate, which was written before a name and surname; information about the place of residence or family nest could be included; land ownership was also included into legitimation. The family coat of arms could also be indicated, however, it is found only in 40% of legitimations. The majority of legitimations contain pedigrees of people to whom the document was issued. Its detail and generational list were not determined by any special norms. Usually it was a pedigree along the male line, which covered three to four generations, in particular, parents, grandfathers, great-grandfathers and

their wives. However, there were deviations, for example, there was provided only data on the male ancestors, nothing was reported about their wives in documents issued by Auschwitz Grodskyi Court. Several dozen legitimations contain pedigrees along both male and female lines. In noble metrics, there are several dozens of legitimations made in the form of an ascending genealogical table-scheme. It is worth mentioning the legitimations issued by Lviv Grodskyi Court, in the majority of which there are no pedigrees (Górzyński, 2009, pp. 21–22; Smutok & Smutok, 2016, pp. 7–11).

The reliability of genealogical data provided in legitimations is generally questionable when it comes to the first two or three generations. Due to the verification of this information, it was possible to detect occasional minor errors in spelling of surnames, nicknames, and names of mothers or grandmothers. For example, in the legitimation of Ioan Pavel Verzhkhovski of the Slipovron Coat of Arms, the grandmother is called Marianna, while in the legitimation of his brother Ignatyi she is called Agneta (CSHAUL, f. 165, d. 6a, c. 33, pp. 131–132; c. 21, pp. 204–205). It should be noted that such errors are not typical when of writing male ancestors. Each individual case, in particular, in depth information about great-grandfathers and subsequent generations requires additional verification, as there are quite significant inconsistencies there (Smutok, 2007, pp. 87–93).

There are legitimations containing a list of documents that the nobility submitted to confirm their nobility, however, they are extremely few. This is usually typical of documents issued by Belz Zemskyi Court and sometimes for legitimations issued by Przemyśl Zemskyi and Grodskyi Courts. Their number was different and included from several to two dozen acts dated from the 16th to 18th centuries. After all, it could simply be a metric record of a person's birth. Sometimes legitimations contain general expressions about the presence of documents from the Grodskyi and Zemskyi Courts, the Crown Metrica, etc. (Smutok & Smutok, 2016, p. 10)

The Nobility Certificate in terms of content does not differ much from the legitimation. Its form consisted of two parts: the first provided information about a person or people, who confirmed their noble origin and received legitimation. Pedigree taken from the legitimation itself was usually presented. The second part contained information about a person, who received the certificate, as well as inference of his or her pedigree from a legitimation person. The source scientific potential of certificates regarding the nobility is due to the fact that they inform about subsequent generations of the legitimation nobility. Unfortunately, they do not cover all families, but only some of those, who needed such confirmations of the nobility. If there are about 6 thousand legitimations, then there are about 2,5 thousand certificates. The Nobility Certificates allow us to trace the history of noble families within the 19th – the beginning of the 20th centuries. It could be three to four generations on average. Information about people to whom the certificates were issued is usually more detailed than in legitimations. The certificates contain data on the year and place of birth of a person, scope of his or her activity, geography of land ownership, and residence place. Some of them contain information on coat of arms of the nobility. As there could be the information on the nobility's family coats of arms, which was not provided in legitimations hence, it is considered to be the supplement to the legitimations. In some cases, the Nobility Certificates clarify and correct the pedigrees provided in the legitimations (Smutok & Smutok, 2020, pp. 3–7). Taken into consideration the legitimations and Nobility Certificates, we could state that the above-mentioned represent the nobility's family composition of Galicia and are a good basis for studying their genealogy.

The materials of the States Department form another type of ennoblement documentation. This is a large archival complex, which includes almost 5369 files stored in Fund 165, Description 3. They are grouped by individuals and families. They vary in volume and number, i.e. several hundred pages. These are documents that reflect the work that preceded the issuance of the legitimations and the Nobility Certificates. That is, this is correspondence between interested people and government institutions; copies and originals of documents that formed the evidentiary base of a noble origin of a particular person; copies and drafts of the legitimations and the Nobility Certificates. This documentation is a good illustration of how the process of ennoblement was carried out. There are many documents from the 16th – 18th centuries among these materials. The absolute majority of them are extracts from Grodskyi and Zemskyi acts, from the Crown Metrica, the Crown Tribunal, royal privileges, letters, etc. A valuable type of documentation is the protocols of witness interviews, which provide interesting information about the circumstances of life and the history of families, which government documents usually do not record (CSHAUL, f. 165, d. 3, c. 189, 2027, 3038, 3102, 4342, 4597, 4602, 4696 etc.).

Interesting information on the history and genealogy of the Galician nobility could be found in the materials of Lviv Nobility Court, which operated from 1784 to 1855 (Louis-Wawel, 1899; Godsey, 1999; Mark Rudolf, 1994; Mark Rudolf, 2019). It is a large volume of documentary material, numbering about 50 thousand cases. They are grouped thematically into 6 groups. These are the so-called inheritance cases, which number about 10 thousand. Today they form a separate Description of 2 Fund 149. The materials on the case of child custody are separated into Description of Fund 3,149 and number 6570 cases. The documents on property and financial disputes, which are included in Descriptions 4 and 5 of Fund 149, and in total number almost 30 thousand cases. Documents 2 and 3 of the descriptions overlap with each other, and are practically identical in terms of the type of documentation. Each case concerns, as a rule, one person and contains the so-called inspection acts, inventories of movable and immovable property, wills, witness interrogation protocols, property agreements, extracts from documents of government institutions in the fields and in Lviv. The most interesting is the so-called inspection act, the form of which consisted of 15 points formulated in the form of questions. The answers to them were aimed at a comprehensive study of the situation surrounding the deceased and his probable heirs. This includes information about the circumstances of death, family ties, general data on the property status. The materials of Descriptions 4 and 5, where court cases are concentrated, consist of documents with the following content: complaints, acts of interrogation of witnesses, copies of property agreements, extracts from the documentation of other government institutions, extracts from cadastral maps, etc. Apparently, they are not so informative and are inferior to the documents of Descriptions 2 and 3 from the point of view of genealogy, but on the other hand, they contain much more information about the property status of the nobility (Smutok, Lyseyko & Smutok, 2020; Kaminski, 1972).

Another documentary mass was formed as a result of the existence and activity of the so-called Krajeva (Regional) Tabula, which contains a lot of information on the history and genealogy of the Galician nobility. It was created in 1780 and existed until 1871. It was created to keep records of real estate, city and the nobility land ownership. Formally, the access to the Krajeva (Regional) Tabula was granted to the Dominical nobility, that is, the nobility that owned subjects, in other words, the Krajeva (Regional) Tabula kept records of the noble Dominical lands (Glassl, 1975, pp. 111–115; Mark Rudolf, 1994, p. 67; Godsey, 1999, pp. 78–79; Godsey,

2013, p. 702; Eder, 2019, p. 101). However, as evidenced by the material of Lviv Nobility Court, to which the Krajeva (Regional) Tabula was subordinate, free nobility, i.e. those who did not have their own subjects, also submitted and entered property transactions into the tabular books. The documents of the Krajeva (Regional) Tabula allow us to track the land turnover of large nobility landownership, trace the change of owners and find out under what circumstances the lands passed from one hand to another (Ślusarek, 1994, p. 134). Similarly, the Krajeva (Regional) Tabula, which is kept in the Central State Historical Archive in Lviv, includes land registers that were kept locally, in each settlement. Here we come across books that came from individual nobility settlements, in particular, Kulchytsi, Chaikovychi (CSHAUL, f. 165, d. 3, c. 1742, 2258). They contain full-text property agreements, wills, and gifts (Chaykovychi), or a separate register in the form of registries (Kulchytsi).

The materials of the Krajeva (Regional) Tabula are grouped in the form of books covering the entire territory of Galicia and are divided into various subgroups thematically, for example, books of owners, books of wills, books of contracts, books of agreements, books of gift records, books of agreements. They were kept in a chronological order. They are supplemented by indexes compiled by the Austrian officials, which are intended to facilitate the search for information. Some books were kept by the so-called districts, in other words, circulars. During the almost century-long existence of the Krajeva (Regional) Tabula, its officials regularly conducted search work, made various extracts, so these extracts, grouped by individual estates and individual families, constitute an additional considerable archival mass, which today is also included in Fund 166 of the Central Institute of Historical and Cultural Heritage in Lviv (Louis-Wawel, 1899, p. 410; Glassl, 1975, pp. 111–112).

The materials on the history and genealogy of the nobility of Galicia could also be found in the metric books of the Greek Catholic and the Roman Catholic churches. Since 1784, after the reform, the metric books were equated with government documents, their form was developed and unified. From that time until the end of the Austrian Empire, they were represented not by single copies of individual parishes, but by a large complex of documentary material on the natural movement of the population from the entire territory of Galicia. The books were kept by priests on site in each parish, the originals were kept in the parish archive, the priests bore personal responsibility for the proper registration and preservation of the metric books (Lobko, 2010; Lobko, 2012; Ediev & Gisser, 2007, p. 331; Dalla-Zuanna & Rossi, 2010, pp. 819–820). Since 1788, the parish clergy had been obliged to make copies of the register books every year and send them to the consistory in Przemyśl and Lviv. Nowadays, the register books are in the Central Archives of the State Archives of the City of Przemyśl in Lviv, in the regional archives of Ivano-Frankivsk and Ternopil, in the State Archives of the City of Przemyśl and in the Main Archive of Ancient Acts in Warsaw. Some copies and groups of books could be found in museum collections, in private collections and in local churches (Zvorskyi, 2009, p. 11). The degree of their preservation varies. And this, in turn, affects the possibilities of studying the genealogy of noble families. It is well illustrated by the situation with the metric books from the Carpathian region, where there were separate noble settlements. For example, the metric books were not preserved from the Bachynski family nest, from Komarnyky, where the Komarnytski originate, there are no metric records from 1816 to 1844, and from 1844 to 1902. The metric books were preserved from the village of Krushelnytsia only starting from 1835. There are metric records from the village of Matkova, where the Matkivski came from for 1810 – 1851, and for 1895 – 1897. This is if we are talking about the Greek Catholic parishes (Smutok & Lyseyko, 2023, p. 17).

The situation with the metric books in the Roman Catholic parishes is much worse. The absolute majority of the metric books from local churches during the interwar period were seized and taken to Przemyśl. In 1944, the metric books were lost when they were transferred of the archives of the Roman Catholic diocese in Przemyśl (Budzynski, 1993, pp. 223–235). As a result, the gaps there are much bigger, for example, from the parish, which was located in the town of Turka and covered several dozen villages in the mountainous part of the present day Sambir district, only birth records were preserved, starting from 1789 (CSHAUL, f. 165, d. 3, c. 7589). There are no Roman Catholic registers for the 19th century at all from the village of Chaikovychi, where the Chaikivski came from. However, we have a certain set of birth, marriage and death registers from 1784 till World War I from the village of Hordynia (CSHAUL, f. 165, d. 3, c. 3620, 3823).

In Ternopil and Ivano-Frankivsk regions the situation with the metric books is as follows: the originals of metric records from the end of the 18th – mid-19th centuries did not preserve. We only have copies sent to the consistory at the time. As a rule, they cover the period from 1835 to 1865. The originals that preserved to our time date mainly from the 1870s and are stored in regional archives. If we are talking about the Roman Catholic books from the same territories, then, as a rule, these are books preserved from the 1810s to the 1850s. The metric records of the Roman Catholic churches from the territories of Galicia from the second half of the 19th century, should be found in the Main Archive of Ancient Acts in Warsaw (Smutok & Lyseyko, 2023, p. 19).

The information capabilities of the birth records are determined not only by the degree of preservation, but also by the completeness of the records. The priest could indicate the surname and first name of parents, could indicate who they were as daughters and sons in turn at the birth of a child. It was not regulated by the government regulations and was carried out at the discretion of a parish priest. The birth records were usually laconic until the 1830s and 1740s. Starting from the 1860s, the priests tried to write the most complete information about people, who got married or about the parents, whose births he registered. In birth records, the priests usually indicated the social status or class affiliation of people, but they determined this mainly at their own discretion. In settlements where the nobility prevailed and where a noble identity was preserved for a long time, a priest outlined the status of his parishioners, as a rule, with the designation “noble”, “born”. However, there were parishes where their status was described as peasant, meaning the priest did not emphasize this (Slyvka, 2009, p. 57; Slyvka, 2014, p. 155).

The metric records, in the absence of other genealogical information, are almost the only source for the genealogy of noble families, which allows for the reconstruction of the pedigree until the end of the 18th century, if the family invariably lived in a certain settlement. The situation becomes more difficult significantly if the nobleman or subsequent generations of the family permanently migrated. It was typical of the absolute majority of government officials and representatives of the clergy. At the same time, the geography of movement was not limited to Galicia. Being a military man, a priest, a teacher or a government official, a nobleman could end up in Bohemia or Italy. Of course, under such circumstances, working with the metric books is complicated significantly.

The Conclusions. Documents on the history and genealogy of the nobility of Galicia at the end of the 18th – first half of the 19th century consist of several complexes. The first is the documents created in the process of ennobling the nobility. These are the legitimations, the Nobility Certificates which have come down to us in the form of copies, recorded in the

so-called the nobility metrics. There are also documents of the States Department, consisting of several thousand cases, grouped by individual families and individuals, which contain preparatory documentation that preceded the issuance of the legitimations and the Nobility Certificates. The second complex is documents of Lviv Nobility Court, represented by almost 50 thousand cases. These are documents of a judicial and property nature, which reveal the material aspects of the life of the nobility and cover a significant part of it. Another complex of documents is the Krajeva (Regional) Tabula Acts, which reflect the history of land circulation in Galicia, in general of the Dominican nobility, but partly also of free nobility. Another documentary complex is formed by the metric books of the Greek Catholic and the Roman Catholic churches, which allow us to reconstruct the genealogy of the nobility and certain aspects of its social evolution using the example of individual families and individuals.

Acknowledgement. We express sincere gratitude to all members of the editorial board for consultations provided during the preparation of the article for publishing.

Funding. The authors did not receive any financial support for the publication of this article.

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*The article was received March 14, 2024.
Article recommended for publishing 29/11/2024.*

UDC 930(477)(092)“18/19”:378.4(477.83-25)
DOI 10.24919/2519-058X.33.317480

Vitalii TELVAK

PhD hab. (History), Professor at Department of World History and Special Historical Disciplines, Ivan Franko Drohobych State Pedagogical University, 24 Ivan Franko Street, Drohobych, Ukraine, postal code 82100 (telvak1@yahoo.com)

ORCID: 0000-0002-2445-968X

Researcher ID: X-5320-2018

Viktoria TELVAK

PhD (History), Assistant Professor, Department of World History and Special Historical Disciplines, Ivan Franko Drohobych State Pedagogical University, 24 Ivan Franko Street, Drohobych, Ukraine, postal code 82100 (viktoriateltvak75@gmail.com)

ORCID: 0000-0003-4671-743X

Researcher ID: 3026747/viktoria-teltvak/

Віталій ТЕЛЬВАК

доктор історичних наук, професор кафедри всесвітньої історії та спеціальних історичних дисциплін, Дрогобицький державний педагогічний університет імені Івана Франка, вул. Івана Франка, 24, м. Дрогобич, Україна, індекс 82100 (telvak1@yahoo.com)

Вікторія ТЕЛЬВАК

кандидатка історичних наук, доцентка кафедри всесвітньої історії та спеціальних історичних дисциплін, Дрогобицький державний педагогічний університет імені Івана Франка, вул. Івана Франка, 24, Дрогобич, Україна, індекс 82100 (viktoriateltvak75@gmail.com)

Bibliographic Description of the Article: Teltvak, V., & Teltvak, V. (2024). Mykhailo Hrushevskyy's path to the chair of Ukrainian history at Lviv University: an attempt at reconstruction. *Skhidnoievropeiskyy Istorychnyy Visnyk [East European Historical Bulletin]*, 33, 51–62. doi: 10.24919/2519-058X.33.317480

MYKHAILO HRUSHEVSKYY'S PATH TO THE CHAIR OF UKRAINIAN HISTORY AT LVIV UNIVERSITY: AN ATTEMPT AT RECONSTRUCTION

Abstract. *The purpose of the study is to reconstruct the circumstances of Mykhailo Hrushevskyy obtaining a professorship at Lviv University. The methodological basis of the research is an interdisciplinary approach. Particular emphasis is placed on the structural and functional systematic analysis of historiographical facts and the comparative historical method, based on the principles of objectivity and historicism. In the study there have been also used methods of periodization, classification and typologization. The scientific novelty of the article consists in an attempt to reconstruct the process of M. Hrushevskyy's appointment to the Department of History of Ukraine at Lviv University in a holistic manner. Conclusions.* In conclusions, it is noted that M. Hrushevskyy's appointment to the Department of Eastern European History at Lviv University was made possible by the successful coincidence of many objective and subjective factors. The former includes a sufficiently high level of cultural development and political self-organization of Galician Ukrainians, who in the

second half of the 1880s and at the beginning of the 1890s articulated and brought to the public domain the issue of opening a university department for the history of their people, and managed to implement it despite numerous difficulties. The second is dominated by a personal factor: both the initiators of this educational campaign and the applicants for the chair were fully aware of the uniqueness of the historical chance, and therefore did not hesitate to put national duty above private interest. The situation was especially difficult for V. Antonovych, who, while realizing the importance of his personality at the beginning of the action, also understood that the challenges of the Lviv professorship were too much for him to bear. Skillfully playing a triple game (with Galician people's representatives, Viennese bureaucrats, and Kyivan community members), he "delayed" the opening of the department until his student received his master's degree. The considerable risks of this feat and the stormy emotions that raged among those involved were rewarded by M. Hrushevskiy's phenomenal work in Galicia. Moreover, as a result of this project, the Ukrainians entered the era of war and revolution conscious of their cultural identity and historical unity as a nation.

Keywords: M. Hrushevskiy, V. Antonovych, Department of History of Ukraine, Lviv University, "new era".

ШЛЯХ МИХАЙЛА ГРУШЕВСЬКОГО ДО КАФЕДРИ ІСТОРІЇ УКРАЇНИ У ЛЬВІВСЬКОМУ УНІВЕРСИТЕТІ: СПРОБА РЕКОНСТРУКЦІЇ

Анотація. Метою дослідження є реконструкція обставин отримання Михайлом Грушевським професури у Львівському університеті. **Методологічне підґрунтя** роботи становить міждисциплінарний підхід. Особливий акцент зроблено на структурно-функціональному системному аналізі історіографічних фактів і порівняльно-історичному методі, виходячи з принципів об'єктивності й історизму. У дослідженні було також використано методи періодизації, класифікації і типологізації. **Наукова новизна** статті полягає у спробі цілісної реконструкції процесу спровадження М. Грушевського на кафедру історії України у Львівському університеті. **Висновки.** У підсумку відзначено, що потрапляння М. Грушевського на кафедру історії Східної Європи Львівського університету стало можливим завдяки вдалому збігу багатьох об'єктивних і суб'єктивних факторів. До перших варто віднести достатньо високий рівень культурного розвитку та політичної самоорганізації галицьких українців, які протягом другої половини 1880 – на початку 1890-х рр. артикулювали і винесли у публічну площину питання відкриття університетської кафедри для історії свого народу, а також спромоглися її реалізувати, незважаючи на численні труднощі. Серед других домінує персональний чинник – як ініціатори цієї освітньої акції, так і претенденти на кафедру виявилися вповні свідомими унікальності історичного шансу, тож без вагань поставили народний обов'язок вище приватного інтересу. Особливо складною ситуація була для В. Антоновича, який, усвідомлюючи вагомість своєї особи на початку акції, розумів також непосильність для себе викликів львівської професури. Майстерно ведучи потрібну гру (з галицькими народовцями, віденськими бюрократами та київськими громадівцями), він "притримав" час відкриття кафедри до моменту здобуття його учнем магістерського ступеню. Чималі ризики цієї гри та бурхливі емоції, що вирували в середовищі причетних до справи осіб, були варті феноменальної у своїх наслідках діяльності М. Грушевського на галицькому терені. Адже значною мірою завдяки їй, українці вступили у добу війни та революції свідомою своєї культурної самобутності й історичної єдності нацією.

Ключові слова: М. Грушевський, В. Антонович, кафедра історії України, Львівський університет, "нова ера".

The Statement of the Problem. The Lviv period of Mykhailo Hrushevskiy's life and work has always been essential for the researchers of his work due to several reasons. First of all, it is the impressive scale of the scholar's scientific, organizational, and social achievements of the time, owing to which a young pupil of Volodymyr Antonovych's school became one of the most authoritative and recognizable representatives of the Ukrainians in the eyes of foreigners on the eve of World War I. This focus is also due to the well-preserved

source base: to date, M. Hrushevskyy's diary and a significant amount of epistolary material of M. Hrushevskyy and his colleagues, memoirs of contemporaries, office materials of many institutions, etc. have been published. All of this makes it possible to reconstruct the events of the prewar twenty years of the historian's life, sometimes by day and, in some cases, even by hour. We do not have as much information about any other chapter of the historian's life.

However, the circumstances that led the Kyivan scholar to Galicia are still represented in an extremely stereotypical way. Many contemporary historiographers believe that M. Hrushevskyy's appointment to the Lviv faculty was predetermined by the initiators of the Polish-Ukrainian understanding that went down in history as the "new era". However, the numerous diverse documents available today (diaries, memoirs, records of Lviv University, etc.) suggest that the young scholar's arrival in the capital of the crown land of the Austro-Hungarian monarchy was rather the result of a happy coincidence for Ukrainian culture. Our research is devoted to its reconstruction.

The Review of Recent Research and Publications. Lubomyr Vynar began the scientific study of the problem of M. Hrushevskyy's transfer from Kyiv to Lviv by publishing government documents he found in the Vienna archives on the establishment of the Department of East European History and the appointment of a graduate of V. Antonovych's school (Vynar, 1986). Subsequent historiography, both diasporic (Telvak & Sabinskyi, 2022) and contemporary (Onopriienko, 1994; Zashkilniak, 1995), has long popularized the observations of the founder of Hrushevskyy studies. Their rethinking and deepening were proposed by researchers of the Lviv period of the author's life, such as Vitalii Telvak, Vasyl Pedych, Kostiantyn Kurylyshyn, and the others. In several publications (Telvak, Pedych & Telvak, 2021; Telvak & Telvak, 2022b), using materials from the Lviv University archives, correspondence of those involved in the action, and contemporary journalism, they also touched upon the circumstances of M. Hrushevskyy's transfer to Transnistria. However, there is no complete picture of the fostering and implementation of the idea of granting the young scholar a professorship in Lviv today. This is the reason for the relevance of the chosen topic.

The Purpose of the Research. The purpose of the study is to reconstruct the circumstances of M. Hrushevskyy obtaining a professorship at Lviv University.

The Results of the Research. Firstly, it is necessary to outline the very genesis of the idea of opening a department of Ukrainian history at Lviv University. The need for its establishment was first raised at a congress of Ukrainian students from Galicia and Bukovyna held on September 17, 1880, in Kolomyia. In accordance with its decisions, in 1881, a delegation of students submitted a petition to the Academic Senate of Lviv University to establish a department of Ukrainian history. The Senate responded to this petition with a letter on July 28, 1881, in which it noted that "for the time being" it could not positively consider the desire of Ukrainian youth (Levytskyi, 1926, pp. 182–183). Despite the negative response, the issue of the Ukrainian history department at Lviv University has not left the agenda of Galician politicians since then.

This issue was covered in particular detail in Hrushevskyy's well-known *Memoirs* by the prominent Galician public and cultural figure Oleksandr Barvinskyi, who was most immersed in the matter. According to his testimony, in the mid-1880s the idea of opening a department of Ukrainian history took on a new meaning for the establishment of the Department of Polish History at Lviv University. Galician public figures of the People's Party orientation, as well as their like-minded associates from the Dnipro region, united in the Kyiv group, began to implement this idea. Among them were O. Barvinskyi, Yu. Romanchuk, V. Antonovych,

O. Konyskyi, and the others, who were the founders of the Shevchenko Literary and Scientific Society. They managed to interest Prince Adam Sapieha, who had well-established contacts with Viennese bureaucrats, primarily with ministers Baron Paul Gauch and Count Gustav Kalnoki, who were responsible for translating this idea into practice. The initiators of the department planned to appoint the most authoritative Ukrainian scholar of the time, Professor Volodymyr Antonovych of St. Volodymyr's University in Kyiv, who was favourably disposed to the idea. However, A. Sapieha's illness and withdrawal from the case took away the project's chances of being realized (Barvinskyi, 1925, pp. 4–5).

The idea of establishing a history department for the indigenous population of Eastern Galicia at the Lviv alma mater received a second chance in early 1891, when, as a result of early elections, members of People's Party, including the initiator of the whole affair, O. Barvinskyi, were elected to the Viennese Parliament. When he was putting the department's work into practice, he consulted with V. Antonovych, who visited the Galician capital in January 1891 to discuss the practical parameters of the Polish-Ukrainian agreement, including the establishment of the Department of Ukrainian History in Lviv. According to Mykhailo Pavlyk, in conversations with the Ukrainians in Lviv, the Kyivan scholar openly admitted that he was "trying to get the chair of Ukrainian history, which some Poles had promised him" (Drahomanov & Pavlyk, 1910, p. 105).

In accordance with the agreements with the Poles and the Naddniproians, on June 20, 1891, when discussing the budget of the Ministry of Education, O. Barvinskyi for the first time raised the issue of the need to open a department of Ukrainian history at Lviv University from the parliamentary rostrum. Since then, with his characteristic pragmatism, he persistently solved numerous problems that arose on the way to this important national cause. Describing them, the politician wrote in his memoirs: "All sorts of doubts, difficulties, and obstacles from the scientific, national and political, religious, and financial standpoints arose and intersected here, which had to be explained, fought with, and eliminated to reach the desired goal" (Barvinskyi, 1925, p. 6).

Detailing the problems just mentioned, O. Barvinskyi noted that despite the generally sympathetic attitude to the idea of opening the department, due to the Polish-Ukrainian rapprochement, the primary problems arose with its name. The point was that Viennese officials considered the disciplinary nomenclature of "Ukrainian history" not only unscientific but also dangerous for political reasons. First of all, they expected opposition to this name from the Polish rulers of the region, who considered it inconsistent with their tradition of "kinship" interpretation of the Ukrainians, who were consistently called the Rusyns. Also, the ethnonym "Ukrainian" could have provoked unnecessary protests from the Russian officials, as it was banned in the Romanov Empire. Finally, a reasonable assumption was made that this ethnonym would contribute to the nationalization of Ukrainian consciousness, which threatened the unity of the population of the crown land. These considerations were reflected in a document signed on March 22, 1892, by the Minister of Education P. Gauch, which generally supported the idea of the Ukrainian deputies. He emphasized that since Ukrainian history could not be considered a "concrete science", a second department of world history should be established at Lviv University, with instruction in Ukrainian, which should focus on the past of Eastern Europe (Vynar, 1986, p. 82).

Another major problem was the candidacy for the chair. The trouble was that it was difficult to predict the reaction to the invitation to a conservative Catholic country of V. Antonovych, a man of the Orthodox faith who had a dramatic history of breaking connections with the Polish

community in the Naddniproian part of the country. However, given that the Galicians insisted on the candidacy of Kyiv professor, P. Gauch had to agree. Thus, in the aforementioned document, he indicated that the Galician governor Kazimierz Badeni, offering him possible candidates for such a chair, “drew special attention to two teachers [...], namely university professors Antonovych in Kyiv and Levytsky in Krakow, both of them Ukrainians and well-known authors on the area of the European East” (Vynar, 1986, p. 83). It is noteworthy that P. Gauch did not consider it necessary at that time to disclose the fact of teaching a new history subject in Ukrainian, as well as the possibility of appointing a scholar from the sub-Russian lands to the department. This document contained Emperor Franz Joseph’s permission to open “the second chair of general history at the University of Lviv, beginning with the school year 1893/94, provided that it receives constitutional authorization for the necessary measures”. The emperor’s decree is dated March 31, 1892 (Vynar, 1986, p. 84).

As mentioned above, Galician Ukrainians saw only V. Antonovych as Professor of the new department. They were talking about the major scientific authority of the Kyiv professor and his recognition among Western European researchers of the past. The founder of the Kyiv school of source studies himself understood this, so he agreed to let Lviv residents use his name in negotiations with Viennese bureaucrats. However, V. Antonovych’s real intentions were quite different – he planned to pave the way for the opening of the department with his name and give it to his most prominent student, M. Hrushevskyy. We learn about this from the latter’s diary and Autobiography. He recalled that in early 1891, V. Antonovych, returning from a business trip abroad, reported on the imminent opening of a department of world history with Ukrainian as the language of instruction at Lviv University, which was essentially to be a department of Ukrainian history. The Kyiv scholar knew that Galician Ukrainians wanted to see V. Antonovych himself at the head of this department. However, the latter, due to a number of personal circumstances, did not agree to this proposal and recommended M. Hrushevskyy instead. “This plan,” he later recalled in his Autobiography, “...was accepted by me with enthusiasm against the significance that was then attached to the Galician movement in Ukrainian circles: in Galicia, they hoped to create an all-Ukrainian cultural centre, literary and scientific, with the work of writers and scientists from all over Ukraine, and with its achievements to break through the system of proscription of the Ukrainian word and nationality in Russia, to raise a national movement in Russia, etc.” (Hrushevskyy, 1965, p. 7).

The diary reflects the young historian’s mood about the teacher’s proposal: on the one hand, it certainly flattered his ego, but on the other hand, it imposed a huge responsibility. Mykhailo wrote in his diary: “My professorship was set very decisively, and worries me, especially since it was not thought out in advance. I want to talk about it today with Volodymyr Bonifatiyovych” (Hrushevskyy, 1997, p. 131). A few days later, such a conversation took place, and the interlocutors “came out in complete solidarity” (Hrushevskyy, 1997, p. 132). The opening of the department and the invitation of the young researcher to Lviv excited his imagination with great prospects for working for the Ukrainian cause. On January 21, 1892, he wrote in his diary that “it [the matter of the department] occupies my mental space”, and on January 24, “[...] I am tired of it, too many thoughts racing in my head”. It is interesting that not only the Galician initiators of the opening of the Lviv department, but also the Kyivan activist Oleksandr Konyskyi, who was immersed in the matter, did not know about these conversations between V. Antonovych and his student. In turn, the novice historian did not realize that his teacher was having conversations with him without agreement with the Naddniester people.

As soon as M. Hrushevskiyi agreed in principle to move to Lviv, his teacher began preparing his Lviv friends to replace him. However, he did this in a somewhat strange way, because in April 1893, in a letter to O. Barvinskyi, he put forward financial conditions regarding monetary compensation for his wife and children in case of premature death (Barvinskyi, 1925, pp. 8–9). At the same time, V. Antonovych responded evasively to repeated requests from Lviv residents for his final consent to take the chair, each time raising new circumstances in his letters that prevented him from making a decision. This caused growing fears among the Galicians about the success of the whole project, since the issue of the professor's candidacy was a key one. Therefore, they delegated their representatives to Kyiv to discuss the case on the spot with V. Antonovych himself. For example, at the beginning of 1893, Ivan Beley, an editor of the Lviv newspaper "Dilo", came to Kyiv from Lviv for this purpose (Zashkilniak, 1995, p. 131). However, he did not manage to clarify the matter which confirmed the suspicions about V. Antonovych's reluctance to move to Lviv. This concern was expressed by O. Konyskyi in a letter to O. Barvinskyi, in which he summarized I. Beley's visit: "Probably nothing will come of Pasichnyk [V. Antonovych]" (Barvinskyi, 1925, p. 9).

Obviously, V. Antonovych himself realized that the final decision could not be delayed any longer. At the same time, he decided to address his explanations not to the initiator of the whole affair, O. Barvinskyi, but to Professor Omelian Ohonowskyi of Lviv University. In his letter, written in French, the Kyivan activist stated that, given his family relations and his advanced age, he could not accept the department's proposals (Barvinskyi, 1925, p. 9). In this letter, he publicly announced for the first time that he considered it appropriate to delegate his best student M. Hrushevskiyi to the chair. O. Ohonowskyi informed the initiators of the department about the letter from his Kyiv colleague. V. Antonovych refusal caused a real panic among the Galician supporters of the "new era" policy, as it could have negated many years of efforts to open the first university department of Ukrainian history in the history of our science. In his 'Memoirs', O. Barvinskyi recalls that "this news was like a thunderous defeat for me, because my long and difficult efforts to realize this far-reaching idea were dispelled in one wave like a gloom. With what face could I now appear before the ministers and the governor, with whom I had discussed this matter in every possible way [...]" (Barvinskyi, 2010, p. 626).

The Polish supporters of the "new era" K. Badeni and a well-known historian, the head of the regional school board Michał Bobrzyński, having learned about the content of V. Antonovych's letter to O. Ohonowskyi, began semi-official relations with M. Hrushevskiyi through the mediation of the university's affairs officer, Counselor Shavlovskiyi. In his letters, the latter asked Antonovych's student whether he would agree to run for the Lviv department. He sent these letters through the hands of O. Konyskyi, who was shocked by V. Antonovych behaviour, calling it "meddling" (Barvinskyi, 1925, p. 10). M. Hrushevskiyi was also caught off guard, as he imagined that the offer to take the chair would be made in a fully official manner. O. Konyskyi felt this confusion of the young scientist, so he strongly advised him to immediately respond with full consent in order not to ruin the whole departmental affair. Fortunately, M. Hrushevskiyi obeyed his mentor. As a result of the stress, O. Konyskyi even experienced another exacerbation of his heart disease.

At the same time, O. Barvinskyi still cherished the hope of influencing his Naddniproian friend. In agreement with the Galician governor, he once again went to Kyiv in December 1893 to persuade his colleague with his eloquence. At a meeting with V. Antonovych at

O. Konyskyi's house, where M. Hrushevskiy was also invited, O. Barvynskiy "in hot words" portrayed the need for the Kyiv professor to move to Galicia. However, as we know, the latter's refusal was determined long before the conversation. As O. Barvynskiy recalls, V. Antonovych responded to his request: "Take my best student, Mr. Hrushevskiy, he will perform his task very well, you will be satisfied with him" (Barvynskiy, 2010, p. 628). Reasonable remarks by O. Konyskyi and O. Barvynskiy that Galicia needed a "ready-made authority" that the young scholar would only have to become did not change V. Antonovych's position. Therefore, the Galician politician "was forced to return to Lviv with this idea to now name Mykhailo Hrushevskiy as a professor" (Barvynskiy, 2010, p. 629).

O. Barvynskiy faced the difficult task of getting the leaders of the region and the Ministry of Education to recognize the Kyiv professor's student as worthy of a university chair and the position of an ordinary professor, which, according to educational practices of the time, required not only a doctorate but also habilitation. The complexity of the new challenge is evidenced by the fact that O. Barvynskiy in his letters to his friends and in his Memoirs repeatedly mentioned unexpected problems, with understandable resentment toward V. Antonovych. Their solution took a lot of time, so the date of the department's opening had to be postponed for a year, until October 1894.

It also took some time to coordinate M. Hrushevskiy's affairs. Among them, was convincing him of the need to change his citizenship and take the oath of allegiance to the emperor. M. Hrushevskiy agreed to this demand, provided that the Russian authorities would have nothing against it. It should be noted that despite repeated reminders from Austrian officials, the scholar never changed his citizenship. The opinion of his parents about moving to another country was also important to the young historian. As we know from O. Konyskyi's letter, after a short period of deliberation, they sent their blessing to their son. Thus, all the problems on the part of the young nominee were resolved.

After V. Antonovych's final resignation and the nomination of his student to fill the chair, the Galician Ukrainians began to introduce M. Hrushevskiy to the local public. To this end, the Lviv press published several articles about the future professor. For example, "Dilo" openly explained that since there was no candidate among Galicians with the right professional level, the final solution was to invite a historian from the Naddniprian part of the country. At the same time, it was further explained, that one should not expect V. Antonovych to move to Lviv, given his advanced age and undermined health in the confrontation with the tsarist regime. Therefore, the only thing left to do was to look for the right scholar among the students of the famous Kyivan Ukrainianist, those who had not yet linked their fate to any of the Russian universities but had already proven themselves in science. In this way, the anonymous contributor to "Dilo" led his reader to the fact that there was no alternative to the candidacy of the best pupil of the Kyiv school: "P. Hrushevskiy became famous in the Slavic scientific world with his "History of the Kyivan Land", and professional critics in Russia and Poland gave his work well-deserved praise. Thus, just as M. Hrushevskiy is generally recognized as capable of occupying the chair of Ruthenian history in Lviv on the basis of his scientific qualifications, so on the other hand M. Hrushevskiy could most easily occupy this chair from the point of view that he had not yet, so to speak, chained himself, like other historians older than him, to any Russian university" (Katedra, 1893, p. 1).

Given these circumstances, M. Hrushevskiy made great efforts to prepare for the publication of the volumes of acts of the "Bar Starosta District" and to finalize the text of his master's thesis. He rightly believed that arriving in Lviv as an ordinary professor at the age

of 28 without a degree would not allow him to gain proper authority among his colleagues at the university. A letter to Hanna Yampolska gives an idea of the historian's workload at the time: "There is a lot of work, if there were 60 hours in a day instead of 24, it would probably be enough for me. Then I could cope with current affairs, work in the archive for my dissertation, prepare for the master's exam, and maintain relationships with close people" (CSHAUK, f. 1235, c. 273, p. 27v.).

In accordance with the order of the Ministry of Religions and Education in Vienna, a competition was announced in the spring of 1893 to fill the position of professor of the newly created department. According to the minutes of the meeting of the professorial board of the Faculty of Philosophy at Lviv University, when selecting candidates, its members were fully aware of the political importance of the new department: "The measure should be not only the scientific value of the published works of the candidates but, above all, the purpose of the new department and the tasks that the newly called professor will face. Our crowned land is the guardian of Western culture in the northeastern part of the country, and our alma mater has the difficult but honourable task of being its visible luminary from afar. And which academic discipline can provide more suitable fuel for this than historical scholarship? The professor of the newly created department will have to, on the one hand, familiarize university youth with the historical and literary products of the East, and on the other hand, process and apply them in the spirit of the West" (Pakholkiv, 2014, p. 272).

Three candidates agreed to participate in the competition: V. Antonovych, M. Hrushevskiy, and V. Milkovych. Two Ukrainian members of the philosophy faculty, I. Sharanevych, an Old Ruthenian, and O. Ohonovskiy, a Narodovets, offered a different understanding of the priority of these candidates. Thus, the former pointed out that the most appropriate nominee would be the famous Galician historian, Julian Tselevych. However, he noted, after his untimely death, there were only three candidates "whose qualifications and suitability for this position have been properly tested." Thus, Sharanevych gave the first place to the Kyiv professor, put V. Milkovych in second place, and M. Hrushevskiy in third. I. Sharanevych's preference for V. Milkovych, who had much more modest scientific achievements than the Kyiv student, can be explained by the similarity of their ideological sympathies, as both were prominent figures in Russophilia movement. Instead, O. Ohonovskiy put V. Antonovych in the first place, his student in the second, and gave the third place to V. Milkovych (SALR, f. 26, d. 5, c. 510, p. 35).

The professors of the Faculty of Philosophy, having studied the works submitted for the competition, spoke about the advantages and disadvantages of each of the three candidates. In the case of M. Hrushevskiy, it was noted that he "is well acquainted with the Russian historical sources and the latest the Russian historical publications, and has a wealth of historical material" (Pakholkiv, 2014, p. 276). Lviv scholars recognized the young scholar's monograph on the history of Kyivan Rus as very successful: "The author worked on his book extremely diligently, collected the material with great care, and if the purpose of his work was to work out a separate history of the Kyivan Rus, cutting it out, so to speak, from the history of the entire the Russian land, he achieved it" (Pakholkiv, 2014, p. 276). At the same time, since M. Hrushevskiy works of the time were based on published source material, Lviv professors pointed out that "he lacks a scientific historical methodology [...] based on an accurate critical analysis of sources, which is why his contribution to the enrichment of historical science is small" (Pakholkiv, 2014, p. 276). They also regretted "that such a capable and vigilant young scholar knows only Slavic languages, which somewhat limits his scientific outlook" (Vynar, 1986, p. 79). They meant that all of M. Hrushevskiy's works

submitted to the competition were published only in the Russian and the Ukrainian. As a graduate of the classical gymnasium and the Faculty of History and Philosophy, Hrushevskyy was fluent in several languages. In general, the members of the board concluded, given the applicant's considerable knowledge of East Slavic historiography and Ukrainian studies, that "he should be taken into account."

It is clear that with his candidacy, V. Antonovych only wanted to pave the way for his student, and he eventually succeeded. After the voting of the professors, V. Milkovych's candidacy was dropped because the issues of the research papers he submitted to the competition did not align with the department's profile. And since the Kyiv professor withdrew his candidacy, citing his advanced age, M. Hrushevskyy was the only candidate left. Therefore, Lviv scholars had no choice but to recommend him to the ministry for the position of professor of the newly created department. However, the board of the Faculty of Philosophy, accepting a 27-year-old historian without a doctorate, decided to protect itself by giving him a three-year probationary period. Summarizing the election of the Kyiv master's student to the Lviv department, we fully agree with Sviatoslav Pakholkiv observation: "So, Hrushevskyy's appointment was a double success. First of all, he was lucky for himself, because the professors saw his young age as a chance for a new start, and Galician Ukrainians benefited greatly from Hrushevskyy's further activities in Lviv" (Pakholkiv, 2014, p. 278).

It is interesting that the Viennese bureaucrats collected information not only about the scientific qualifications of the candidates, but also about their political beliefs. In the Austrian archives, L. Vynar managed to find the official description of the Ministry of Religions and Education for M. Hrushevskyy. The public credo of the young Kyiv applicant was characterized quite objectively: "He belongs to the direction of the Young Ruthenian nationals of the so-called Ukrainian direction, so he is not a supporter of either pan-Slavistic or ultra-nationalist tendencies" (Vynar, 1986, p. 79). Obviously, such political preferences completely satisfied both the metropolitan and regional administrations, because there were no reservations in this regard.

On March 27, 1894, an appeal was sent from the office of the Austrian Minister of Religion and Education Von Madriski to the Emperor of Austria-Hungary with a request to appoint M. Hrushevskyy as a professor of the second department of world history with a special overview of Eastern Europe at Lviv University (Vynar, 1986, pp. 85–86). The result of this appeal was a rescript signed by the emperor on April 11, 1894, which nominated "fellow" M. Hrushevskyy as a full professor at Lviv University, effective October 1 of the same year (SALR, f. 26, d. 5, c. 510, p. 1). This news caused elation in Ukrainian patriotic circles. The Lviv newspaper "Dilo" wrote: "The newly appointed prof. M. Hrushevskyy [...] is a young man, at the best age for professorial and scientific work, one of the most capable young scientists of V. Antonovych school [...]. With such scientific strength, Lviv University will win, Ruthenian youth will win at the university, and the Ruthenian cause outside the university will win. Prof. M. Hrushevskyy will become our link of scientific interests between Austrian and sub-Russian Ukraine-Rus [...]" (Novyny, 1894, p. 1).

There was great joy among the creators of the idea of founding the Lviv department. Thus, in a letter dated April 19, 1894, O. Konyskyi wrote to Mytrofan Dykarev: "Please be pleased with our very important news: the tsar approved Hrushevskyy as an ordinary professor at the history department in Lviv. Personally, this is an indescribably great joy for me! This is the moment from which the history of our national education and culture will begin" (Vozniak, 1929, p. 375). Similar were the emotions of the other initiator of the case, O. Barvinskyi, who

wrote in a letter to a young colleague: “This [nomination of M. Hrushevskiy as a professor – Author] made us unusually happy, and I am the first to express to you this sincere and heartfelt consolation and the warmest congratulations for you to a very important matter” (Telvak & Telvak, 2023, p. 61).

After defending his thesis on May 24, 1894, M. Hrushevskiy completed the publishing work related to his master’s thesis and prepared for future lectures. As evidenced by his contemporaneous epistolary, the newly appointed professor felt a burdensome need to expand the department’s issues from the past of Ukrainian territories to the history of the entire Eastern European area. However, later the obligation to teach the history of Eastern Europe course imposed by the nomenclature of the department revealed its positive possibilities. First of all, it allowed the scholar to expand the event context for the reconstruction of the Ukrainian past. Also, thanks to this course, students of non-Ukrainian origin joined M. Hrushevskiy’s teaching audience (Telvak & Telvak, 2023), which contributed to the popularization of his historiographical hypotheses in Polish (Telvak, Yanyshyn & Telvak, 2023), Czech (Telvak & Telvak, 2019), Romanian (Telvak & Ilnytskyi, 2018), German (Telvak & Yanyshyn, 2021; Telvak, Yanyshyn & Telvak, 2021), French (Telvak & Telvak, 2022a) and other historiographic environments.

At that time, M. Hrushevskiy imposed the first epistolary contacts with the administration of Lviv University, proposing and defending his vision of both the nomenclature of educational Ukrainian studies courses and the specifics of their teaching. Thus, coordinating his academic load with the dean of the Faculty of Philosophy Antonii Kalina, M. Hrushevskiy separately noted the need to introduce a scientific seminar for students, emphasizing that “a seminar on the study of sources [...] I consider necessary for the presentation of the ancient period of the Russian history” (SALR, f. 26, op. 365, p. 6).

Gradually immersing himself in Galician affairs, M. Hrushevskiy, in his letters to O. Barvinskyi, became more and more interested in the problems of the development of Shevchenko Scientific Society and the content of its “Notes”. The Galician politician, understanding the importance for the young colleague to have full awareness of the intricacies of Lviv life, persuaded him to come to Lviv for a few days before the summer vacation, to give a speech at the meeting of the National Academy of Sciences and to make the necessary acquaintances. However, tired of preparing and defending his master’s thesis, the Kyiv scientist refused: “The spirit is eager, but the flesh is weak and requires rest for autumn work; it would not be possible for me to travel to Lviv for 2-3 days, because I would have to visit a lot of people so as not to offend anyone. I sincerely hope you will not take offense.” (Telvak & Telvak, 2023, p. 62).

M. Hrushevskiy spent his summer vacation with his parents in the Caucasus. In mid-August, he returned to Kyiv to complete some business and publications. As a part of sending off Hrushevskiy to Galician Ukraine, the Kyiv community held a farewell meeting. Oleksandr Lototskyi, a participant, described these gatherings as “extremely solemn” (Lototskyi, 1934, p. 62). While sending the young professor to Lviv, the senior citizens of Kyiv fervently wished that he would “nurture the feeling of national and cultural unity of the Ukrainian people with his activities, so that the young generation, namely the academic youth, as well as older workers, would take a step forward from the empty, immeasurable dreams and rally for real scientific work” (Barvinskyi, 1925, p. 16). All the speeches at the farewell party were dominated by the discourse of “sacrifice”, which the young historian brings to his people by moving to an unfamiliar country.

It is expected that the historian's parents were very worried about their son's departure to a distant country that was little known to them. Giving instructions to Mykhailo before the long journey, Glafira Zakharivna was especially worried that he would be lonely in a foreign land. She recalled: "Dad also, when he decided to leave his homeland, thought about getting married so as not to go alone" (Kucherenko, Pankova & Shevchuk, 2006, p. 409). The father's instructions to his son were imbued with experiences: "To work under science and not to interfere in politics [...]" (Kucherenko, Pankova & Shevchuk, 2006, p. 117).

M. Hrushevskyy left Kyiv by train and arrived in the Galician capital on Saturday, September 17 (29 – according to the new style) of 1894. To some extent, it was symbolic that a new chapter in the young scientist's biography began on the day of his birth. As we know, after moving to Lviv, the historian started a new chapter in the history of the cultural and socio-political life of his people.

The Conclusions. In conclusion, we note that M. Hrushevskyy's appointment to the Department of Eastern European History at Lviv University was made possible by the successful coincidence of many objective and subjective factors. The former includes a sufficiently high level of cultural development and political self-organization of Galician Ukrainians, who in the second half of the 1880s and early 1890s articulated and publicized the issue of opening a university department for the history of their native people, and managed to implement it despite numerous difficulties. The second is dominated by the personal factor: both the initiators of this educational campaign and the applicants for the chair were fully aware of the uniqueness of the historical chance, and therefore did not hesitate to put their national duty above private interest. The situation was especially difficult for V. Antonovych, who, while realizing the importance of his personality at the beginning of the action, also understood that the challenges of the Lviv professorship were too much for him to bear. Skillfully playing a triple game (with Galician people's representatives, Viennese bureaucrats, and Kyivan community members), he "delayed" the opening of the department until his student received his master's degree. The considerable risks of this game and the stormy emotions that raged among those involved were worth M. Hrushevskyy's phenomenal work in Galicia. After all, it was largely thanks to him that Ukrainians entered the era of war and revolution as a nation conscious of its cultural identity and historical unity.

Acknowledgement. The authors express their gratitude to the members of editorial board.

Funding. The authors did not receive any financial support for the publication of this article.

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*The article was received April 22, 2024.
Article recommended for publishing 29/11/2024.*

UDC 94(477)“189/191”:316.34(=411.16)
DOI 10.24919/2519-058X.33.317479

Andrii SENCHENKO

Applicant of Department of History, National University of Kyiv-Mohyla Academy, 2 Hryhoriy Skovoroda Street, Kyiv, Ukraine, postal code 04070 (senchenko.andrii@gmail.com)

ORCID: 0000-0002-2101-7691

Андрій СЕНЧЕНКО

здобувач кафедри історії, Національний університет “Києво-Могилянська академія”, вул. Г. Сковороди, 2, м. Київ, Україна, індекс 04070 (senchenko.andrii@gmail.com)

Bibliographic Description of the Article: Senchenko, A. (2024). Imperial Russia's military manpower policy and the issue of Jewish equality at the end of the 19th – the beginning of the 20th centuries. *Skhidnoievropeiskyi Istorychnyi Visnyk [East European Historical Bulletin]*, 33, 63–73. doi: 10.24919/2519-058X.33.317479

IMPERIAL RUSSIA'S MILITARY MANPOWER POLICY AND THE ISSUE OF JEWISH EQUALITY AT THE END OF THE 19th – THE BEGINNING OF THE 20th CENTURIES

Abstract. *The purpose of the article is to analyze the main factors that led, firstly, to the spread of universal military service among the Jews of the Russian Empire on general terms in 1874, and then to the attempt to remove them from the ranks of the armed forces of the state on the eve of World War I. **Research Methods.** In the article there have been used general scientific and historical methods for the historical reconstruction of the main trends in the policy evolution of the Ministry of War of the Russian Empire regarding the conscription of the Jews for a military service in the last quarter of the 19th and the beginning of the 20th centuries. In the article there have been used three purely historical methods, namely historical genetic, comparative historical and internal criticism of sources. The historical genetic method has been used in the attempt to trace the main trends in the development of the idea of a military duty in the Russian Empire. The comparative historical method has been used to identify the key features and consequences of the application of a general military service in the Russian Empire compared to Western European states. The internal criticism of sources has been used to analyze the archival materials. **The scientific novelty** of the obtained results consists in detemining of the main reasons for the evolution of the leadership policy of the Russian Empire regarding the service of the Jews in the armed forces of the Empire from conscription on general terms to an attempt to eliminate the Jewish soldiers from the armed forces of the state completely. **The Conclusions.** The extension of near-universal conscription among the Jewish population as part of the 1874 military reform was a promising sign for supporters of the Jewish equality in the Russian Empire. At the same time, the initiators of the military reform hoped that military service could become an effective means for integration of this distinct national minority into the Russian society. However, the introduction of an inclusive manpower policy in the armed forces of the Russian Empire did not lead to the integration of the Jews and other national minorities into the dominant society. Furthermore, the Russian government eventually initiated an attempt to remove the Jews from service in the armed forces on the eve of World War I and found an overwhelming support for such reform among high-ranking military officials.*

Key words: *Jews, Russian Empire, military manpower policy, near-universal conscription, equal rights.*

КАДРОВА ПОЛІТИКА РОСІЙСЬКОЇ ІМПЕРАТОРСЬКОЇ АРМІЇ ТА ПИТАННЯ ЄВРЕЙСЬКОЇ РІВНОСТІ НАПРИКІНЦІ ХІХ – ПОЧАТКУ ХХ ст.

Анотація. Мета статті – проаналізувати основні чинники, що привели спершу до поширення на євреїв Російської імперії універсального військового обов'язку на загальних умовах у 1874 р., а потім до спроби усунути їх із лав збройних сил держави напередодні Першої світової війни. **Методи дослідження.** У цій статті використано загальнонаукові та історичні методи, які автор залучив для реконструкції основних тенденцій в еволюції політики Військового міністерства Російської імперії щодо призову євреїв на військову службу в останній чверті ХІХ та на початку ХХ ст. У статті також використано три суто історичні методи, а саме історико-генетичний, порівняльно-історичний та метод внутрішньої критики джерел. Історико-генетичний метод вжито для здійснення спроби простежити основні тенденції у розвитку ідеї військового обов'язку в Російській імперії. Порівняльно-історичний був застосований для виявлення ключових особливостей та наслідків застосування загальної військової повинності в Російській імперії порівняно із західноєвропейськими державами. Метод внутрішньої критики джерел послугував для аналізу архівних матеріалів. **Наукова новизна отриманих результатів** полягає у встановленні основних причин еволюції політики керівництва Російської імперії щодо служби євреїв у збройних силах від призову на загальних умовах до спроби повного усунення єврейських солдатів зі збройних сил держави. **Висновки.** Поширення загальної військової повинності на єврейське населення у рамках військової реформи 1874 р. могло бути сприйняте як обнадійливий сигнал прихильниками єврейського рівноправ'я в Російській імперії. Водночас ініціатори військової реформи сподівалися, що військова служба може стати ефективним засобом інтеграції цієї відособленої національної меншини в російське суспільство. Однак запровадження інклюзивної кадрової політики у збройних силах Російської імперії не призвело до інтеграції євреїв та інших національних меншин у панівне суспільство. Зрештою, напередодні Першої світової війни російський уряд ініціював спробу усунути євреїв зі служби в збройних силах і знайшов підтримку такої реформи серед абсолютної більшості вищих офіцерів.

Ключові слова: євреї, Російська імперія, політика комплектування збройних сил, загальна військова повинність, громадянське рівноправ'я.

The Problem Statement. The Russian Empire extended near-universal conscription to the majority of the male population in 1874. At the same time, the extension of military duty to the majority of the population of the empire, unlike in many Western European countries, did not lead to the granting of additional rights to conscripts, since this reform did not foresee any connection between their rights and duties. Despite this, the introduction of staffing of the Russian Empire armed forces exclusively by means of conscription had far-reaching consequences, since the universal nature of military service required implementation of the declared principle of equality for all male subjects in their performance of this duty without the possibility of substitution (*Ustav o voinskoy povinnosti*, 1874). Moreover, this principle was extended to the entire male population of some national minorities (Sanborn, 2003, p. 21), which led to the conscription of the Jews into the armed forces of the Russian Empire on general terms in 1874. The recruitment of the Jews to serve in the armed forces of the Russian Empire on equal terms immediately became one of the reasons for an intense debate about the Jewish equality, since publications with accusations of the Jewish draft evasion and refutations of these accusations began to appear in the press almost immediately after the introduction of near-universal conscription among the Jewish population of the empire. Eventually, the senior leadership of the Russian Imperial Army even tried to exclude the Jews from the army on the eve of World War I. Thus, there was a dramatic evolution of the policy of the Ministry of War of the Russian Empire regarding the involvement of the Jews in the armed forces in the second half of the 19th and the beginning of the 20th centuries under

the influence of a change in the views of high-ranking military officials and the leadership of the Empire: from hopes of integrating the Jews by means of a military service on the Western European model to an attempt to eliminate them from the armed forces, despite all the possible consequences of such a policy.

The Review of Recent Publications and Researches. At the beginning of the 1990s, Western and Israeli researchers of the history of Eastern European Jewry gained access to archival materials on the territory of the former USSR and in Eastern Europe in general. They used this opportunity to elucidate previously little-studied pages of the Jewish history in Eastern Europe. John Klier, Shaul Stampfer, and other researchers started a new era in the study of Jewish history based on the source materials now available in Eastern European archives. New researchers of the Jewish history from Western and post-Soviet countries were also able to take advantage of the new opportunities. In particular, Yohanan Petrovsky-Shtern was the first to do the research on the service of Jews in the armed forces of the Russian Empire in detail (Petrovskii-Shtern, 2003). Semion Goldin analyzed the attitude of the armed forces of the Empire towards the Jewish population during World War I (Gol'din, 2018). Other researchers of the history of the Russian Empire also took advantage of access to the archives. The main feature of our research is an attempt to fit the events and phenomena related to the spread of general military conscription among the Jews in the Russian Empire, and subsequent attempts to remove them from the army, in a more general context of modernization and nation-building in Europe in the second half of the nineteenth and at the beginning of the twentieth century. Because of this, the publications of researchers who studied the emergence of modern states and the impact of a general military conscription on modern states and societies were also used in this article (Kaspersen & Strandsbjerg, 2017; Krebs, 2006).

The Purpose of the Research is to identify the main phenomena that led first to the spread of a universal military service among the Jews of the Russian Empire on general terms in 1874, and then to the attempt to remove them from the ranks of the armed forces of the state on the eve of World War I.

The Results of the Research. Dmytro Miliutin and other military professionals initiated the introduction of general military conscription in the Russian Empire to modernize the armed forces of the state by borrowing the idea of universal military conscription as a new military technology without a clear connection with the ideas of the nation-state and the armed nation, which were interconnected in Western European countries. This reform was fully applied to the Jews in 1874, albeit in the following decades the War Ministry's policy towards this minority underwent a dramatic evolution from conscription on equal terms to the introduction of separate rules for the recruitment of the Jews and later even to an attempt to eliminate them from the armed forces altogether. The large-scale challenges that faced the armed forces of the empire and the regime in general at the turn of the 19th and 20th centuries had a decisive influence on this evolution of views on the place of the Jews in the Empire's armed forces.

The introduction of near-universal military service in the Russian Empire was the most important part of the 1874 military reform and a promising sign for supporters of the Jewish emancipation. A large part of the Jewish elite and the Russian-Jewish intelligentsia believed that the service of Jewish conscripts in the armed forces under the same conditions as any other citizen would be a crucial step towards obtaining equal rights for the Jews. At least, they hoped to rely on the Jewish military service as a strong argument in discussions on the Jewish equality. At the same time, high-ranking military officials considered military service as a tool for the integration of different national minorities.

For the Jewish leaders, the adoption of near-universal conscription in the Russian Empire looked like a military decision to pursue more inclusive policies and a signal about state readiness for the integration of the Jews into the dominant society. The continued existence of the Pale of Settlement and other special laws regarding the Jews created certain complications for the military service of representatives of this minority. A relaxation of these restrictions on the Jewish conscripts might have seemed quite likely. However, in reality, mass conscription of the Jews for military service only meant that the army was forced to deal with a condition that certain soldiers were not allowed to reside legally in some parts of the empire (State Archive of the Russian Federation, f. 102, inventory 76-a, case 884, photocopy in *Central Archives for the History of the Jewish People*, HM2/9972.10.).

The stark difference between the views of military officials and the Jewish leaders on the goals of the military reform regarding the Jews can be explained by a lack of awareness of national minorities about the reasons for drastic changes in imperial policy. In St. Petersburg the Jewish leaders were much better informed about government policies than the rest of the population. However, they had limited influence on the formation of these policies and needed to draw conclusions and make corresponding decisions based on incomplete data and in an uncertain environment. According to Ronald Krebs, uncertainty is a characteristic feature of the relationship between a strong central government and weak national minorities in general. To examine this relationship, R. Krebs suggests an explanatory model where the behaviour of national minorities depends on changes in the military's participation policy. R. Krebs considers this model to be the most suitable for analyzing the behaviour of minorities in democratic societies (Krebs, 2006, p. 38). However, its general principles may be useful for explaining the reaction of minorities to the extension of near-universal conscription to their representatives or, in this case, for interpreting the behaviour of Jewish leaders in the Russian Empire after the 1874 reform.

Modern general military service originated in France at the end of the eighteenth century. Other European and some non-European countries – including the Russian Empire – adopted this manpower policy in the form of near-universal military service, in the following century. In Western countries, the acceptance of general military service was closely linked to the granting of citizenship to a larger part of the population based on the fulfillment of their military duties. According to Morris Janowitz, “It was only in the West that military service, in the mass conscript armies of the nineteenth century, was seen as compatible with the duties and rights of citizenship” (Janowitz, 1976, p. 187). In European countries, the emancipation of the Jewish population was an integral part of the aforementioned transformations. In the Russian Empire, however, only non-privileged groups were forced to bear the burden of military service until 1874, and the introduction of near-universal conscription did not entail changes in their rights.

In the second half of the nineteenth century, major reforms in the Russian Empire led to the adaptation of Western European practices not only in the military but also in the economic, legal, and other spheres of life. Among the adherents of Western European experience was the new social group of the Russian-Jewish intelligentsia. It emerged as a result of the state policy aimed at integrating the Jews into the dominant society by weaving them into the imperial system of higher education and a special system of education for the Jews. The Russian-Jewish intelligentsia participated in the discussion of the Jewish issue in the Russian Empire actively and spread their ideas through the newly-born Russian-Jewish press. The Russian-Jewish intelligentsia sought to imitate the Western experience and derived their ideas about

the Jewish emancipation from Western European thought. Therefore, intelligentsia found appeals for equal rights for the Jews based on military service to be a good way to obtain the support of Russian officials and society.

The Russian Empire experienced a serious transformation at the end of the nineteenth and the beginning of the twentieth centuries. Great Reforms gave impetus to economic and social development. However, a whole series of challenges threatened the very existence of the empire. The Crimean War (1853 – 1856) demonstrated the vulnerability of the Russian Empire against the background of the rapid development of Western European countries that embarked on the path of industrialization, urbanization, and social transformation. The victorious wars of Prussia and the emergence of the German Empire only aggravated the fears of Russian high-ranking officers and bureaucrats. The Russian Empire relied on traditional elites and conservative ideology (Sanborn, 2003, p. 9). However, many military intellectuals embraced the idea that the survival of the empire required its transformation into a militarized national state with a national armed force even before the defeat in the Russo-Japanese War (Sanborn, 2003, p. 10).

From the very beginning, representatives of the Jewish elites were willing to support the introduction of general military service. For them, it was a clear signal that the position of the Jews in the Russian Empire could be greatly improved. The Jewish elite of St. Petersburg made significant efforts to spread information about the benefits of general military service for the Jewish population of the Empire. Baron Joseph Gunzburg, the most influential Jewish leader in St. Petersburg, even published a special letter to the Jewish communities in the Pale (Nathans, 2002, p. 181). However, a series of events at the end of the 1870s and the beginning of the 1880s demonstrated that the Jewish leaders misinterpreted the desire of the government to conscript the Jews to serve in the army. The introduction of near-universal conscription and the participation of the Jews in military service under general military conditions did not pave the way for the emancipation of the Jews and granting them equal rights. The Jewish representatives had insufficient information about the reasons for the reform. They exercised a modest amount of influence during its preparation and were allowed to vote on the conditions of the Jews for joining military service (Petrovskii-Shtern, 2003, p. 177). A lack of access to information indicated the absence of political influence of the Jewish elite in the Russian Empire, similar to the situation of numerous national minorities in other states (Krebs, 2006, p. 30). It also was a primary reason why the Jewish leaders overestimated the significance of near-universal conscription.

One of the unfortunate consequences of the introduction of general military service for the Jews was that the reform deepened the split between the Jewish elites in St. Petersburg and a significant number of the Russian-Jewish intelligentsia, even before the pogrom crisis of the 1880s. In the summer of 1880, the contradictions intensified when the Russian-Jewish journal “*Rassvet*” which was founded by emerging predominantly secular, politically active, and culturally aware Russian-Jewish intelligentsia (Bechtel, 2003, p. 213), refused to recognize the allegations of mass Jewish evasion from military service based on official military statistics (Barsky, 1880, August 7). The inability of the Jewish magnates to react adequately to the pogrom crisis facilitated the confrontation between some members of the Russian-Jewish literary intelligentsia and the traditional Jewish elites in St. Petersburg (Frankel, 1984, p. 74). Eventually, these events led to disillusion and deeper divisions between the representatives of the Jewish minority in the Russian Empire. This happened as the result of the actual failure of the efforts aimed at achieving equal rights for the Jews. A new restrictive

policy of the tsarist government regarding the Jews from the 1880s precipitated conflicts within the circles of the Jewish elite as well.

The majority of the Jews lived in the Pale and had little incentive to support the introduction of universal conscription. Only a minor part of the Jewish population lived in large cities and was integrated into the dominant society. This small number of the Jews was largely integrated into Russian culture and society and enjoyed various rights that were inaccessible to the rest of the Jews. However, the main part of the Jewish population was artificially isolated from imperial centres, and their rights were severely restricted by special laws. This apparent difference in the realities of life led to a divergence of views on general military service. The Russian-Jewish intelligentsia and Jewish leaders in St. Petersburg and other large cities referred to the military reform and the service of the Jews in the army to justify the need for the emancipation of the Jews. At the same time, from the perspective of the majority of the Jews from the Pale, the new near-universal conscription was another unpleasant novelty of the government. While Jewish elites tried to achieve the removal of restrictions on the integration of the Jews and thus demonstrated behaviour of more inclusive minorities, the rest of the Jewish population presented a much larger spectrum of responses to the introduction of near-universal conscription (Krebs, 2006, pp. 36–37).

The creation of the new statute was supervised by the State Council under the supervision of two special commissions summoned for this purpose (Baumann, 1986, p. 33). The Commission on Personal Service considered a whole series of issues about the introduction of individual service obligations, including the conscription of the Jews, which was one of the most controversial. The reformers wanted to apply the principle of personal military duty, and there was already existing practice of Jewish military service in the Russian Empire for almost half a century. Therefore, the exemption of the Jews from military service altogether did not find many supporters. Despite this, the idea of the admission of the Jews to the officer corps met serious opposition.

Although high-ranking military officials initially did not propose any technical obstacles to limit career opportunities for the Jews, some ideological reservations barred their admission to the officer corps. The most important one was the unequal status of the Jews in the state (Petrovskii-Shtern, 2003, pp. 177–179). Russian high officials carried out reforms with a caution to not undermine the old order. Therefore, the extension of general military duty to the majority of the population did not lead to the granting of additional rights for conscripts (Sanborn, 2003, p. 203). Confrontation between the War Ministry and the Ministry for Internal Affairs (hereafter MVD) was the main reason for such an outcome. The War Ministry sought to enlarge the number of available conscripts, and the MVD was determined to ensure the preservation of the old order (Sanborn, 2003, p. 96).

In the first half of the nineteenth century, Count Sergei Uvarov officially declared Orthodoxy one of the foundations of the Russian autocracy as part of his famous formula ‘Orthodoxy, autocracy, nationality’ (Bartal, 2006, p. 95). The admission of the Jews to the officer corps meant to violate this doctrine and spark concerns that it would undermine discipline in the army (Petrovskii-Shtern, 2003, p. 179). Military officials expressed fears that Jewish officers would not be able to command the lower ranks that mostly belonged to the Christian denominations efficiently (Klier, 1995, pp. 336–337). Therefore, the conversion to Orthodoxy was sufficient for removing all obstacles for a candidate to obtain officer rank. Thus, the Jews could still become officers if they renounced the faith of their ancestors, at least until the end of the nineteenth century. The popularization of various racial theories

led to a change of attitude towards the converted Jews. Russian high-ranking officials began to consider the Jews not in religious, but in racial categories (Gol'din, 2018, pp. 35–36). The converts were banned from attending military schools in 1904 (Russian State Military Historical Archive, f. 1, op. 1, d. 64758, photocopy in CAHJP, HM2/8280.17). Thus, at the beginning of the twentieth century, the Jews were deprived of all opportunities for career growth in the Russian military.

The idea that the Jews were prone to evade military service existed even before the extension of universal conscription to this minority. That is why, the development of measures to prevent the Jews from evading military service was an important point of consideration for the drafters of the new statute. The representatives of Jewish communities and adherents of Jewish equality were able to convince the commission not to create special rules for the conscription of the Jews in the first version of the statute enacted in 1874. Nevertheless, they were added during the following years. The main purpose of these rules was to prevent the Jews from avoiding military service by imposing a peculiar form of collective responsibility on them. For example, new rules stipulated that the shortage of Jewish conscripts was to be compensated exclusively at the expense of the Jewish population (Petrovskii-Shtern, 2003, pp. 180–181). The necessity of such measures was justified by new statistical data that allegedly showed that the Jews evaded military service on a massive scale.

The Russian-Jewish intelligentsia and the Jewish elites of St. Petersburg not only propagated the idea of near-universal conscription among the Jews but also appealed to the Jewish population not to avoid military service. The Russian-Jewish intelligentsia was also forced to refute accusations that the Jews avoided military service on a massive scale in their periodicals. The accusers heavily relied upon military statistics to prove their allegations. For a short period even Russian-Jewish intelligentsia became convinced in the existence of the phenomenon of mass evasions of the Jews and at the end of the 1870s called on the Jews not to avoid military service since at that time faith in statistics as a new objective science was too great (“Russkii evrei”, 1879, September 23). The Russian-Jewish intellectuals started to make significant efforts to refute these allegations only in 1880 (Barsky, 1880, August 7). The whole book was published in 1886 with a detailed analysis of the military statistics to which the accusers referred (Rabinovich, 1886). Supporters of the Jewish equality thoroughly analyzed all the inaccuracies and manipulations of the statistics to deny the aforementioned allegations vigorously. However, these efforts did not yield the desired results. Military intellectuals did not pay serious attention to the arguments of the adherents of Jewish equality about the misinterpretation of the military statistics until 1911 when the military ministry tried to substantiate the need for the removal of the Jews from the armed forces of the Russian Empire (Russian State Historical Archive, fund 400, inventory 19, case 37, pp. 41–53, photocopy in CAHJP, HM 2/8279.6).

The Russian-Jewish intellectuals used the military service of the Jews as an argument, drawing attention to their loyalty and willingness to sacrifice their lives for the homeland despite their deeply unequal status in the Russian Empire. Such reference to military service was a common strategy of the communal leaders of national minorities campaigning for the rights of the latter to obtain first-class citizenship (Krebs, 2006, p. 18). Military service provided a powerful argument that created rhetorical coercion forcing opponents to acknowledge the differences between declared principles and the real situation of respective communities. According to Krebs, “...a generalizable mechanism of rhetorical coercion that shows how political contestants can rhetorically box their opponents into a corner,

leaving the latter without the rhetorical resources with which to deny the former's claims" (Krebs, 2006, p. 13).

In the Russian Empire the leaders of the Jewish community had serious reasons to consider military service as a useful rhetorical instrument in the struggle for Jewish equality. In the second half of the nineteenth century, the government initiated a series of decisive reforms to implement Western ideas and approaches to create institutions that already functioned abroad. The idea about the direct correlation between military service and first-class citizenship was transferred from Western European thought. The arguments of the opponents of Jewish equality in the Russian Empire reveal that this idea infiltrated their discourse as well. According to the opponents of Jewish equality, the allegations that the Jews escaped conscription into the army on a massive scale undermined their image as loyal military servants and must have justified the unequal status of the Jews. The attempts to remove the Jews from service in the armed forces and the opposition to these initiatives by the adherents of Jewish equality indicate the existence of a notion about the same correlation between military service and equal rights. Ultimately, the Jewish population was obliged to bear the military burden without obtaining any additional rights. Supporters of the Jewish equality retained rhetorical points, but at the same time, the Jewish population of the empire received another push for radicalization.

According to the new draft statute, the Jews performed military service along with the main part of the population, despite their unequal status in the Russian Empire. The initiators of the military reform decided to recruit the Jews and some other national minorities for practical and ideological reasons. They hoped that the expansion of a recruitment pool would more evenly distribute military duty to the population of the empire and provide troops only with suitable recruits. At the same time, Dmitrii Miliutin and some other high-ranking officials took the view that military service could become an effective means for integrating national minorities into Russian society. According to Miliutin, "General obligatory participation in military service, uniting in the ranks of the army men of all estates and all parts of Russia, presents the best means for the weakening of tribal differences among the people, the correct unification of all the forces of the state, and their direction towards a single, common goal" (RGIA, f. 906, op.1, d. 28, pp. 35–36, quoted in Baumann, 1986, p. 31).

Military officials who supported the military reform did not question Miliutin's views on this issue. Joshua Sanborn in his research on the birth of mass politics in the Russian Empire stresses that these officers sought to imitate the Western European model of the army both in form and content and, therefore, supported the idea of creating a militarized multiethnic nation (Sanborn, 2003, p. 11). Such desire stemmed from the conviction, which became widespread in the military circles of the Russian Empire, that it was necessary to transform each soldier into a motivated fighter. It was envisaged that this new soldier would show initiative on the battlefield under the new conditions of the second half of the nineteenth century – a rapid development of new weapons and the improvements in tactics and strategies (Zaionchkovskii, 1952, p. 50). Mihail Dragomirov, one of the most influential Russian military theorists of this period, believed that every soldier should have a well-developed sense of duty, know his functions, and be ready to perform them in case of need. This sense of duty was based on the rule of law. The law was supposed to oblige soldiers to fulfill their duties while, at the same time, protecting them from the arbitrariness of officers. The sense of duty and observance of clear rules had to guide the life of each unit in the armed forces, not cruel discipline and a developed system of punishment (Dragomirov, 1879, p. 36).

These ideas were rather innovative for the realities of the Russian army, imbued with the culture of violence. Before the reform, military and civilian officials regarded the armed forces as the main penitentiary institution for young criminals (Petrovskii-Shtern, 2003, p. 176). The statute on universal military service abolished such practice in 1874. However, even during the post-reform period, the training of young officers continued to be based on the hierarchical structure underpinned by a system of violence. As a result, these new officers recreated the same system in military units (Sanborn, 2003, p. 169).

Researchers put forward three main hypothetical causes of liberalization of manpower policy in the armed forces: when there is a consensus on the growth of external threats, when there is a transition to professional armed forces, or when the society becomes more tolerant toward various minorities (Krebs, 2005, pp. 529–564). In the case of the Russian Empire, the emergence of an external threat became crucial for the development and introduction of universal military service and its application to Jews. Robert Baumann asserts that “Prussia’s rapid defeat of France in 1870 and the consolidation of German power spurred Russia to a renewed commitment to military modernization and gave Miliutin the leverage he needed to establish universal military service” (Baumann, 1986, p. 33). Thus, Russian military high-ranking officials had serious reasons for the introduction of universal military service.

At the beginning of the 1880s, the imperial government initiated a new policy towards the Jews. It introduced new restrictions on the Jews in the spheres of education, trade, land use, etc. The restrictions in the military sphere were less extensive and were adopted gradually. First, the Jews lost any opportunity for career growth within the armed forces. The general course of state policy to limit the rights of the Jews inevitably influenced the life of the armed forces, even though the War Ministry preferred to stick to its policy (Petrovskii-Shtern, 2003, p. 178). However, the attempts to discharge the Jews from this burdensome duty signaled the worsening of the situation for Jews.

In 1912 – 1913, the mobilization department of the War Ministry surveyed fifty senior officers to gather their opinions about the complete removal of the Jews from the army. This survey showed that the majority of high-ranking officers were fully convinced that it was a necessary measure. These officers expressed a wide range of opinions on this issue, but most of them favoured a complete removal of the Jews from the armed forces. At the end of the survey, its organizers summarized, “So, in conclusion, the Jews are physically unfit for military service and, therefore, unwanted in the army; they are harmful to the army because of their moral qualities; most importantly, in [their] military capability in military affairs [they] are unsuitable and because of [their] harmful, exaggerating political activity in the army [they] are inadmissible. That is why, all the interviewed senior executives, in total 50 people, in their conclusions unanimously recognized [that] to have the Jews in the ranks of the Army as harmful and [it is] desirable to dismiss them from troops, but not all of them recognize the feasibility of this desire” (RSHA, f. 400, in. 19, c. 37, p. 229, photocopy in CAHJP, HM 2/8279.6). In the end, Nicholas II personally supported this point of view as well (Gol’din, 2018, p. 39).

The Conclusions. Such a radical shift of opinions regarding the military service of the Jews illustrates a fundamental transformation of the state policy towards the Jewish population of the empire in forty years. The application of universal military service to Jews marked the state’s desire to integrate them into imperial structures. The attempt to remove the Jews from the armed forces forty years later shows the reverse trend to exclude the Jews from one of the most important state institutions and the dominant society in general. This

radical shift of opinions had multiple reasons, one of which could be the apparent failure of the attempt to assimilate the Jews through military service. Such failure could encourage military officials to change their initial opinions about the necessity of the Jews in the army.

Government attempts to completely remove the Jews from service in the armed forces of the empire on the eve of World War I was a radical intrusion of the state into military manpower policy. It demonstrated that their service in the army was at the heart of the dispute between the adherents and opponents of the Jewish equality in the Russian Empire. To sum up, the military service of Jewish conscripts did not provide the Jews an opportunity to receive equal rights in the Russian Empire, but it became an obstacle to the imposition of additional restrictive measures aimed at them.

Acknowledgment. The author expresses sincere gratitude to his thesis supervisor PhD Vitaly Chernoiivanenko for continuous support and Professor Shaul Stampfer for invaluable pieces of advice during the preparation of this publication.

Funding. The preparation and publication of this article were made possible by a grant from the Memorial Foundation for Jewish Culture.

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The article was received February 27, 2024.

Article recommended for publishing 29/11/2024.

UDC 94(477.83/.86):656.21“18”
DOI 10.24919/2519-058X.33.317466

Volodymyr KLAPCHUK

PhD hab. (History), Professor, Head of Department of Hotel, Restaurant and Resort Business, Vasyl Stefanyk Precarpathian National University, 57 Shevchenko Street, Ivano-Frankivsk, Ukraine, postal code 76018 (volodymyr_klapchuk@ukr.net)

ORCID: 0000-0003-1788-794X

Researcher ID: D-4699-2019

Oleksandr POZDNIAKOV

PhD (Philology), Associate Professor, Associate Professor of Department of Foreign Languages and Country Studies, Vasyl Stefanyk Precarpathian National University, 57 Shevchenko Street, Ivano-Frankivsk, Ukraine, postal code 76018 (dietrich_910@ukr.net)

ORCID: 0000-0001-7525-7108

Researcher ID: HJP-8346-2023

Володимир КЛАПЧУК

доктор історичних наук, професор, завідувач кафедри готельно-ресторанної та курортної справи, Прикарпатський національний університет імені Василя Стефаника, вул. Шевченка, 57, Івано-Франківськ, Україна, індекс 76018 (volodymyr_klapchuk@ukr.net)

Олександр ПОЗДНЯКОВ

кандидат філологічних наук, доцент, доцент кафедри іноземних мов і країнознавства, Прикарпатський національний університет імені Василя Стефаника, вул. Шевченка, 57, м. Івано-Франківськ, Україна, індекс 76018 (dietrich_910@ukr.net)

Bibliographic Description of the Article: Klapchuk, V., & Pozdniakov, O. (2024). Construction and operation of local railway networks in Galicia before the World War I. *Skhidnoievropeiskyi Istorychnyi Visnyk [East European Historical Bulletin]*, 33, 74–92. doi: 10.24919/2519-058X.33.317466

CONSTRUCTION AND OPERATION OF LOCAL RAILWAY NETWORKS IN GALICIA BEFORE WORLD WAR I

Abstract. The Purpose of the Research. In Galicia local railways of contributed to all local socio-economic goals, including passenger transportation. However, the issue of historical reconstruction of a holistic picture of the railways development, and the volumes of passenger and freight transportation, and infrastructure on the basis of new data remain unresolved. Therefore, the purpose of the article is a comprehensive study of the local railways network from the beginning of their construction to World War I. **The Research Methodology.** In the article, the following methods have been applied: the method of periodization, the historical genetic method (for a sequential disclosing the scope and features of construction, railways operation and staffing), the comparative historical method (to compare the development of local railways in different crown lands and voivodeships during different periods), the elements of the historical systemic method for the analysis of the territorial structure and functions, internal and external railway connections of regional importance in Galicia. **The scientific novelty** of

the article consists in the complex analysis of railways in Galicia as an administrative territorial unit of the Austro-Hungarian Monarchy.

The Conclusions. The construction of local railways became possible with the assistance of enterprises that built the first main railway arteries in Galicia. At the end of 1890, there were 41 km of such access lines in Galicia, including: 13.3 km on the C. K. Privileged North Railway of the Emperor Ferdinand; 6.5 km on state railways; the 23.8 km long line Tlumach – Palahychi; 3.9 km along private railways. By the end of 1890, there were 892.5 km of local railways. Railways were built at the expense of local budgets or private investments under the guarantee of the Diet of Galicia and Lodomeria. During the period of 1896 – 1912, 940.835 km of railways were built with a total cost of 95 million Kr. At the beginning of the 20th century, more than 37.3 thousand trains operated on 15 private local railway lines with a total length of 811 km. In 1902, they transported almost 1,750 thousand passengers and over 138,000 tons of freight. In Bukovyna, at the beginning of the 20th century, there were 16 railway lines with a total length of over 520 km. In terms of the length of local railways, Galicia ranked second among the 14 crown regions of Austria, although in terms of density per 100,000 people, it occupied only the 12th place.

Key words: local railway, narrow-gauge railway, the Diet of Galicia and Lodomeria, railway section.

СПОРУДЖЕННЯ ТА ФУНКЦІОНУВАННЯ ЛОКАЛЬНИХ ЗАЛІЗНИЧНИХ МЕРЕЖ У ГАЛИЧИНІ ДО ПЕРШОЇ СВІТОВОЇ ВІЙНИ

Анотація. Мета дослідження. Локальні залізниці Галичини вирішували всі місцеві соціально-економічні завдання, здійснюючи з-поміж іншого, пасажирські перевезення. Однак нерозв'язаною залишається проблема історії цілісної картини розвитку залізниць, масштабів перевезень, інфраструктури на основі отриманих нових даних. Тому метою статті є комплексне дослідження мережі локальних залізниць – від започаткування до Першої світової війни. **Методологія дослідження.** У статті використано такі методи: періодизації, історико-генетичний – для послідовного розкриття обсягів і особливостей будівництва, експлуатації та кадрового забезпечення функціонування залізниць, порівняльно-історичний – для порівняння розвитку локальних залізниць у окремих коронних краях та воєводствах її у різні періоди, елементи історико-системного методу – для аналізу територіальної структури і функцій, внутрішніх і зовнішніх зв'язків залізничного транспорту Галичини регіонального значення. **Наукова новизна** полягає у комплексному аналізі залізниць Галичини як адміністративно-територіального утворення Австро-Угорської монархії. **Висновки.** Зародження локальних залізниць стало можливим за сприяння підприємств, що будували перші головні артерії у Галичині. На кінець 1890 р. у Галичині було 41 км локальних залізниць, у т. ч.: 13,3 км на “Північній залізниці цесаря Фердинанда”; 6,5 км – доїзди на державних колях; 23,8 км – лінія Тлумач – Палагичі; 3,9 – вздовж приватних залізниць. До кінця 1890 р. у Галичині загалом нараховувалося 892,5 км локальних залізниць. Вони будувалися за рахунок місцевих бюджетів або приватним капіталом під гарантії крайового уряду. У такий спосіб впродовж 1896 – 1912 рр. збудовано 940,835 км залізниць загальною вартістю 95,5 млн. корон. На початку ХХ ст. 15 приватними локальними залізницями (811 км) курсувало понад 37,3 тис. потягів, що перевезли 1902 р. майже 1750 тис. пасажирів та понад 138 тис. т вантажів. На Буковині на початку ХХ ст. діяло 16 залізничних гілок завдовжки понад 520 км. За протяжністю локальних залізниць Галичина займала друге місце серед 14 коронних країв Австрії, хоча за щільністю на 100 тис. мешканців – лише дванадцятьє.

Ключові слова: локальна залізниця, вузькоколіяка, крайовий уряд, відтинок.

The Problem Statement. The priority goal of major railways was to create main international transport arteries for passenger and freight transportation to ensure strategic interests of the state. With the development of railway construction, there was a need to create railways, which would also meet the needs of local authorities, primarily at creating opportunities for export of industrial goods, handicrafts, forest resources, etc.

The construction of such railways could make it possible to activate and increase industrial and agricultural production, attract internal and external investments, taking into account the

needs of local communities. The first local railways were built with significant problems and efforts caused not only by difficulties at attracting investments in the construction itself, but also by the impossibility of setting high tariffs. That impossibility led to reduction of operation efficiency and profitability.

In Galicia, both the government and people finally came to the conclusion on the necessity to build a developed network of local railway lines, which should only bring economic profits and contribute to the prosperity of the region. One of the most important legislative acts in terms of development of railways was the resolution of the Diet of Galicia and Lodomeria of July 23, 1880. According to this resolution, the government: 1) exempted construction companies from paying provincial, powiat and gmina taxes, provided that they would have such privilege at the level of the state fiscal service; 2) committed to pay 1,000,000 FI for the purchase of land for the construction of railway tracks; 3) committed to pay 100,000 FI for the reconstruction of access roads to places of the track construction; 4) committed to build access roads to railway stations and stations.

The Review of Sources and Recent Researches. Different issues of establishment, development, and economic features of railways in pre-war Galicia have been studied by a small number of scholars and professionals. There should be a chief focus on the studies by K. Prochaska (1898), E. A. Ziffer (1908), S. Kornman (1911), V. Röhl (1915), J. Skwarczyński (1926), S. Szuro (1997), J. Kurowska-Chiechańska and A. Chiechański (2008), Yu. Tomin, Yu. Romanyshyn, R. Korytko, I. Parashchak (2011). However, their researches were mostly focused on the study of trunk railways. Some authors focused on the study of local railways built for industrial development of the region. Local railways were studied in detail by Volodymyr Klapchuk, Ihar Makaruk, Mychailo Klapchuk (Klapchuk 2007; Klapchuk, 2016; Klapchuk, Makaruk & Klapchuk, 2021), Lesia Polyova, Liliya Loyak, Iryna Mendela (Klapchuk, Polyova, Loyak & Mendela, 2022). Factual material was published in the periodicals “Konzessionsurkunde im Reichsgesetzblatt” (1895, 1907, 1909, 1911), “Reichsgesetzblatt” (1886; 1911), “Halychany” (1894 – 1898), “Kuryer Drohobycki” (1896) and others.

Detailed information on railways economic operations can be found in the “Podręcznik Statystyki Galicyi” edited by Tadeusz Pilat (1901, 1904, 1908, 1913).

The Purpose of the Research. The construction of local railways was carried out by companies that built trunk railways in Galicia. By the end of 1890, there were 892.5 km of local railways. During the period of 1896 – 1912, more than 940 km of railways were built at the expense of local budgets or private investments under the guarantee of the Diet of Galicia and Lodomeria. In Bukovyna, at the beginning of the 20th century, there were 16 railway lines with a total length of over 520 km.

Local railways of Galicia contributed to all local socio-economic goals, including passenger transportation. However, the issue of historical reconstruction of a holistic picture of the development of railways, the volumes of passenger and freight transportation, and infrastructure on the basis of new data remains unresolved. Therefore, the **purpose** of the article is a comprehensive study of the network of local railways from the beginning of their construction to World War I.

In the study of local railways in Galicia, we have applied the following methods: the method of periodization, the historical genetic method (for a sequential disclosing the scope and features of construction, operation and staffing of railways), the comparative historical method (to compare the development of local railways in different crown lands and voivodeships during different periods). In addition, we have applied elements of the historical

systemic method (which is considered one of the main methods of historical research of industry and transport) for the analysis of the territorial structure and functions, internal and external railway connections of regional importance in Galicia.

The scientific novelty of the research consists in the complex analysis of railways of certain administrative territorial units of Austria and the Second Polish Republic. For the first time, a comprehensive study of establishing and developing local railways in Galicia has been introduced into a scientific use. In addition, the paper provides a significant amount of newly discovered statistical information.

The Results of the Research. The construction of local railways became possible with the support of companies that built the first trunk railways in Galicia. At the initiative of the Galician Railway of Archduke Charles Louis, the first local lines were built from Jarosław to Sokal and from Dębica to Rozwadów with a branch to Nadbrzeże. At the initiative of the Lviv – Chernivtsi – Iași Railway, the lines from Lviv through Rava-Ruska to Belzec were built (Wierzbicki, 1907, pp. 58–60).

Local lines also included the lines from Bielsk to Kalwaria, owned by the C. K. Privileged North Railway of the Emperor Ferdinand, and Jasło – Rzeszów, which was built at the expense of the state treasury. The lines operated in accordance with the norms provided for the operation of main railways. Therefore, we haven't included them in the list of local railways. The same type of local railways also comprised access lines, i.e. branches from main railways to privately owned industrial facilities. At the end of 1890, there were 41 km of such access lines in Galicia, including: 13.3 km on the C. K. Privileged North Railway of the Emperor Ferdinand; 6.5 km on state railways; the 23.8 km long line Tlumach – Palahychi; 3.9 km along private railways (Wierzbicki, 1907, pp. 70–71).

Since 1890, the government of Galicia pursued a purposeful policy regarding construction of local railways. On the basis of the law of August 23, 1893, the Regional Department of Railways was established. It was decided that the Diet of Galicia and Lodomeria would finance the construction of railways, provided that 1/3 of the total cost would be contributed by the state treasury and local budgets. The government provided guarantees of net profit to ten companies, and gave subventions to six companies. To support the construction, the "Krajowy Fundusz kolejowy" was created. Starting from 1894, it was given 600,000 Kr of annual subsidies. In 1908, the amount of subsidies was increased to 900,000 Kr.

By the end of 1890, there were 892.5 km of local railways with the construction cost of 1,328,341 Fl. The operation of the lines led to the following results (Wierzbicki, 1907, pp. 69–70): 329,028 km of passenger transportation and 126,093 km of freight transportation were carried out; cargo turnover amounted to 71,853.9 thousand gross ton-km; 324,323 passengers were transported (with the exception of the line Dolyna – Vyhoda); 845 people were transported by 1 km of railways.

In addition, the study of the sites for construction of other 15 lines was carried out: Gorlice – Konieczna (the length – 44 km, a preliminary cost – 1.9 million Zł); Jasło – Żmigród – Konieczna (56 km, 2.88 million Zł); Przybówka – Dukla (34 km, 1.5 million Zł); Przeworsk – Dynów (44 km, 2 million Zł); Rzeszów – Dynów – Rymanów (99 km, 2 million Zł); Chortkiv – Zalishchyky (54 km). As of 1898, the length and preliminary cost of 9 lines were not determined: Tymbark (Dobra) – Swoszowice – Wieliczka (or Kraków); Tarnów – Pilzno – Bzostek – Jasło – Bardów; Lviv – Vynnyky; Boryslav – Stebnyk – Skhidnytsia; Przeworsk – Bachóz; Rozwadów – Leżajsk – Jarosław; Yaniv – Yavoriv; Ustrzyki Dolne – the Hungarian border; Stryi – Khodoriv (Wierzbicki, 1907, p. 52).

During the period of 1883 – 1901, the network of local railways in the region grew 12 times (from 8.5 to 963.1 km) (Table 1). As a percentage of Austria, it was 1.38% in 1883, and 15.56% in 1901. The overall growth was 1,100%. Owing to the given fact, the density of local railways per 100,000 people increased from 0.143 to 13.164 km. As a percentage of the region's area, the density of railways increased from 0.11 to 12.27 m/km². There was one kilometer of railway track per more than 9,200 km² in 1883, and 81.5 km² in 1901.

Table 1

Local railways of Galicia (1883 – 1901) (Podręcznik Statystyki Galicyi, 1901, p. 210)

Year	Length, km	Density				
		1 km/km ²	m/km ²	people /1 km	km/100,000 people	% of Austria
1883	8.521	9212.18	0.11	699,320	0.143	1.38
1884	164.811	507.05	1.97	38,491	2.598	17.12
1885	154.811	507.05	1.97	38,491	2.598	14.48
1886	187.333	419.02	2.39	31,809	3.144	13.74
1887	383.200	204.85	4.88	15,550	6.431	22.46
1888	440.462	178.21	5.61	13,529	7.392	20.35
1889	440.462	178.21	5.61	13,529	7.392	18.39
1890	440.462	178.21	5.61	15,002	6.666	17.79
1891	439.692	178.53	5.60	15,028	6.654	15.89
1892	439.026	178.80	5.59	15,051	6.644	15.27
1893	439.026	178.80	5.59	15,051	6.644	14.16
1894	439.026	178.80	5.59	15,051	6.644	13.06
1895	456.537	171.94	5.82	14,474	6.909	13.11
1896	535.052	146.71	6.82	12,350	8.097	14.27
1897	567.805	138.25	7.23	11,637	8.593	13.63
1898	716.019	109.63	9.12	9,229	10.835	14.37
1899	936.737	83.79	11.93	7,054	14.176	16.80
1900	962.627	81.54	12.76	6,864	14.568	16.15
1901	963.100	81.50	12.27	7,596	13.164	15.56

In terms of the length of local railways, Galicia ranked second among the 14 crown regions of Austria (Table 2), although in terms of density per 100,000 people, it was only in 12th place. There was one kilometer of railway track per 7,054 people.

Private local lines played an important role in the economy of Galicia. At the beginning of the 20th century, they transported a significant number of passengers and freight (Table 3). At the beginning of the 20th century, more than 37.3 thousand trains operated on 15 private local lines, which were 811 km long with a total estimated cost of construction of 72,352 thousand Kr (the cost of construction of 1 km was 85.3 thousand Kr on average). In 1902, they transported almost 1,750 thousand passengers and over 138,000 tons of freight. It should be noted that these local lines were of industrial significance being connected with places of resource mining and processing. The railways revenue was over 1.43 million Kr, of which a third went to the line Lviv – Belzec, and a quarter to the line Deliatyn – Kolomyia – Stefanivka. Thus, one kilometer of railway yielded revenue of 1,766 Kr.

Table 2

Local railways of Galicia compared with other Austrian districts, 1899
(*Podręcznik Statystyki Galicyi, 1901, p. 237*)

District of Austria	Length, km	Density				
		km/km ²	m/km ²	people /1 km	km/100,000 people	% of Austria
Galicia	936.737	83.79	11.93	7,054	14.176	16.80
Lower Austria	456.189	43.45	23.01	5,835	17.138	8.18
Upper Austria	281.778	42.53	23.51	2,788	35.857	5.06
Salzburg	175.534	40.74	24.54	988	101.166	3.15
Styria	324.382	69.13	14.46	3,954	25.288	5.82
Carinthia	59.537	173.46	5.76	6,063	16.492	1.07
Carniola	167.187	59.55	16.79	2,984	33.507	3.00
Vorarlberg	19.332	412.06	2.43	35,971	2.780	0.35
Tyrol	118.657	246.83	4.05	7,827	12.777	2.13
Czechia	1,641.715	31.64	31.59	3,559	28.096	29.45
Moravia	844.764	26.39	38.01	2,695	37.102	15.15
Silesia	208.217	24.72	40.46	2,909	34.379	3.74
Bukovyna	340.219	30.72	32.55	1,900	52.617	6.10
Austria	5,574.248	53.82	18.57	4,287	23.33	100

Table 3

Passenger and freight transportation by private railways of Galicia, 1902
(*Kornman S., 1911, p. 50*)

Local railway lines	Length, km	Cost of construction, Kr		Number of passengers	Weight of freight, q	Revenue, Kr (<i>Podręcznik Statystyki Galicyi, 1908, p. 239</i>)
		total cost	cost of 1 km			
Borki Wielkie – Hrymailiv	33.025	1,812,883	54,894	55,518	37,232	56,808
Chabówka – Zakopane with the branch Nowy Targ – Sucha Góra	64.350	7,464,293	115,995	251,439	60,204	156,428
Deliatyn – Kolomyia – Stefanivka	112.622	9,056,042	80,411	164,368	98,743	303,129
Dolyna – Vyhoda	8.531	1,196,274	110,227	13,672	46,668	42,990
Kolomyia local railway	32.150	2,034,911	61,643	5,259	61,214	16,224
Kraków – Kołmierzów with the branch Czyżyny – Mogiła	18.910	2,308,633	105,258	89,373	78,659	67,824
Lviv – Belzec	88.420	8,227,968	92,229	468,846	121,053	455,646
Lviv – Yavoriv	48.735	3,323,916	68,204	131,424	36,834	71,792
Pila – Jaworzno-town	25.835	2,128,344	82,382	17,515	338,083	115,503

Continuation of the table 3

Local railway lines	Length, km	Cost of construction, Kr		Number of passengers	Weight of freight, q	Revenue, Kr (Podręcznik Statystyki Galicyi, 1908, p. 239)
		total cost	cost of 1 km			
Ternopil – Zbarazh	22.478	2,249,845	100,069	20,290	5,328	6,600
Tarnów – Szczucin	48.636	0	0	3,574	820	22,523
Tlumach – Palahychi – Tlumach-town	6.379	55,090	8,636	0	0	–
Trzebinia – Skawce	59.263	668,8337	112,859	46,241	435,441	450,889
Eastern Galician local railway	195.541	21,577,161	110,346	418,693	30,134	854,800
Przeworsk – Bachóz (Dynów) (narrow-gauge railway)	46.248	4,228,765	91,437	62,321	30,134	127,170
Galicia	811.123	72,352,462	1,194,590	1,748,533	1,380,547	1,432,859

Railways were built at the expense of local budgets or private investments under the guarantee of the Diet of Galicia and Lodomeria. During the period of 1896 – 1912, 940.835 km of railways with a total cost of construction of 95,466,300 Kr were built (Table 4). The regional government provided 27,902 thousand Kr under regional budget guarantees, and 5,566 thousand Kr in cash in exchange for shares; the Austrian government provided 37,130,000 Kr under state budget guarantees, and 13,570,000 Kr in cash in exchange for shares; local governments provided 11,297.9 thousand Kr in cash in exchange for shares. In addition, the Diet of Galicia and Lodomeria provided 2.5 million Kr for construction of the sections Khodoriv – Pidwysokie and Przeworsk – Rozwadów (Skwarczyński, 1926).

At the beginning of the 20th century, there were 16 railway lines with a total length of over 520 km in Bukovyna: Nepolokivtsi – Vyzhnytsia (45 km), Nepolokivtsi – Sniatyn (11 km), Chernivtsi – Zalishchyky (49 km), Chernivtsi – Novoselytsia (36 km), Hlyboka – Berehomet (53 km), Stebnyk – Lopushna (17 km), Karapchiv – Chudyn (19 km), Hlyboka – Siret (19 km), Hadikfalva – Brodina (51 km), Hatna – Dorna Vatra (128 km), Karlsberg – Putna (6 km), Chudyn – Koschuya (25 km), Vama – Rușii Moldovița (23 km), Pojorâta – Fundu Moldovei (8 km), Ițcani Suceava (7 km), Vereshchanka – Okna (26 km) (Kormman, 1911, p. 52).

During 10 years (1902 – 1911), there was a significant increase in freight and passenger turnover by private local railways owing to the expansion of their network to 950 km (by 17%) and innovations (mainly due to modernization of rolling stock). The passenger transportation increased by 40% (from 1,750 to 2,442 thousand people), and the freight transportation increased by 68% (from 138 to 232 thousand tons) (Table 5). During that period of time, the revenue increased by 258% to almost 3.7 million Kr. One kilometer of railway yielded revenue of 3,893 Kr. In 1911, annual revenue of private local railways was only 3.55% of the total cost of their construction. During 10 years, the cost of private local railways increased by 44.1% (from 72.3 to 104.2 million Kr), and the cost of construction of 1 km increased by 44.9% (from 1,194.6 to 1,731.4 million Kr). Thus, it can be argued that the revenue growth was twice the cost of construction. The Eastern Galician local railway was the most efficient, as it yielded 23% of revenue. The revenue percentage of the line Lviv – Pidhaisi was a bit smaller (19%).

Table 4

Local railways of Galicia (Skwarczyński J., 1926)

Opening date	Route	Length, km
20.10.1896 –15.01.1898	Eastern Galician local railway	195.541
20.08.1898 (according to other sources – 12.08.1897)	Borki Wielkie – Hrymailiv	33.025
22.01.1898	Łupków – Cisna (narrow-gauge railway)	24.174
14.02.1898	Kraków – Koćmierzów	18.910
15.08.1899	Siersza – Trzebinia – Skawce	59.263
18.10.1899	Deliatyn – Kolomyia – Stefanivka	112.662
25.10.1899, 01.07.1904	Chabówka – Zakopane with the branch Nowy Targ – Sucha Góra	65.131
27.10.1900	Pila – Jaworzno	25.831
14.11.1903	Lviv – Yavoriv	48.735
08.09.1904	Przeworsk – Dynów (narrow-gauge railway)	46.248
25.02.1906	Ternopil – Zbarazh	22.478
15.10.1906	Tarnów – Szczucin	48.636
29.09.1909	Lviv – Pidhaitsi	131.132
18.10.1909	Lviv – Stoyaniv	86.995
25.05.1911	Muszyna – Krynica	10.026
01.06.1912	Drohobych – Truskavets	12.048
Total:		940.835

Table 5

Passenger and freight transportation by private railways of Galicia in 1911 (Podręcznik Statystyki Galicyi, 1908, p. 239; Podręcznik Statystyki Galicyi, 1913, pp. 252–253)

Local railway lines	Length, km	Cost of construction, Kr		Number of passengers	Weight of freight, q	Revenue, Kr
		total cost	cost of 1 km			
Borki Wielkie – Hrymailiv	33.025	1,912,883	57,922	59,686	42,660	63,347
Chabówka – Zakopane with the branch Nowy Targ – Sucha Góra	64.350	7,700,000	119,658	290,525	116,472	241,032
Deliatyn – Kolomyia – Stefanivka	112.622	9,184,000	81,547	209,670	120,578	259,645
Dolyna – Vyhoda	8.531	1,300,000	152,385	14,703	40,641	25,759
Kolomyia local railway	32.150	2,320,000	72,162	17,582	79,860	66,481

Continuation of the table 3

Local railway lines	Length, km	Cost of construction, Kr		Number of passengers	Weight of freight, q	Revenue, Kr
		total cost	cost of 1 km			
Kraków – Koćmierzów with the branch Czyżyny – Mogiła	18.910	2,340,000	123,744	136,175	146,012	78,017
Krynica – Muszyna	11.096	1,400,000	126,171	43,024	6,151	16,223
Lviv – Yavoriv	48.735	3,482,400	71,456	173,119	39,542	71,760
Lviv – Pidhaitsi	131.132	21,180,000	161,517	395,524	99,719	712,545
Lviv – Stoyaniv	85.150	11,308,700	132,809	181,965	81,445	415,403
Piła – Jaworzno	26.304	2,449,000	93,104	43,142	458,120	181,988
Przeworsk – Dynów (narrow-gauge railway)	46.248	4,448,400	96,186	91,677	49,559	127,239
Ternopil – Zbarazh	22.478	2,684,792	119,441	68,969	22,534	76,761
Tarnów – Szczucin	48.636	3,406,372	70,038	171,308	46,776	98,949
Tlumach – Palahychi – Tlumach-town	6.075	145,000	23,868	56,739	18,859	14,476
Trzebinia – Skawce	59.263	6,928,800	116,916	80,092	682,721	399,520
Eastern Galician local railway	195.541	22,000,000	112,508	408,901	271,372	850,400
Galicia	950.246	104,190,347	1,731,432	2,442,801	2,323,021	3,699,545

Thus, on the eve of World War I, there were 2,942.168 km of state railways in Galicia. 281.0 km of state railways were owned by the C. K. Privileged North Railway of the Emperor Ferdinand, 977.672 km – by the State Railway Directorate of Kraków, 1,152.035 km – by the State Railway Directorate of Lviv, 531.461 km – by the State Railway Directorate of Stanisław. The operation of 1,313.611 km of private railways was controlled by the Kraków (228.559 km), Lviv (491.391 km) and Stanisław (596.661 km) State Railway Directorates, respectively. In total, there were 4,258.779 km of railways in Galicia, including 668.509 km of double-track railways. The balance value of state railways was 629,576,769 Kr, the balance value of private railways was 107,544,190 Kr, which was almost 737,121 thousand Kr in total (Skwarczyński, 1926). The density of railways was 5.448 km/100 km² and 5.295 km/10,000 people.

In 1918, 18,110 permanent employees worked on the railways, including 1,961 engineering workers, 3,928 technical workers, and 12,221 service workers (Table 6).

Table 6

Number of employees of Galician railways

State Railway Directorate	Engineering workers	Technical workers	Railway service workers
Kraków	658	1,378	3,991
Lviv	811	1,617	5,568
Stanisław	492	933	2,662
Total:	1,961	3,928	12,221

Eastern Galician local railway (Polish: *Wschodniogalicyskie Koleje Lokalne*; German: *Ostgalizische Localbahnen*, *OGLB*) (Szuro, 1997, pp. 131–139) was built in Eastern Galicia in 1896 – 1898. The railway had a total length of 339.4 km and consisted of eight separate lines: Ternopil – Kopychyntsi (opening date – November 25, 1896; length – 71.77 km); Pidwysokie – Berezovytsia-Ostriv (January 25, 1897; 72.28 km); Halych – Pidwysokie (June 1, 1897; 29.27 km); Khodoriv – Pidwysokie (November 29, 1897; 42.25); Bila Chortkivska – Zalishchyky (November 15, 1898; 51.23 km); Vyhnanka – Teresin – Skala (November 15, 1898; 42.58 km); Teresin – Borshchiv (November 15, 1898; 6.23 km); Borshchiv – Ivanove Puste (December 1, 1898; 23.73 km).

10 locomotives, 41 passenger and 172 freight cars operated on the railway. Before World War I, 12 locomotives were added to the rolling stock.

In 1898, 163 thousand passengers were transported by the railway. By 1913, their number had increased to almost 0.5 million (497 thousand) people. Passengers mostly used Class III cars (81–94%).

In 1898, all eight railway lines transported only 80,600 tons of freight. By 1913, their number had increased 4.5 times (to 270,000 tons). The maximum was reached in 1905, when 312 thousand tons of goods were transported.

In the last decade of the 19th century, the Diet of Galicia and Lodomeria adopted a resolution on the construction of local railways. It also established the Railway Bureau for realization of this project. The Railway Bureau had contributed to construction of 318 km of local railway lines in Galicia by 1900: Borki Wielkie – Hrymailiv (36 km); Łupków – Cisna (narrow-gauge line, 25 km); Trzebinia – Skawce (1899, 69 km); Chabówka – Zakopane (1899, 43 km); Deliatyn – Kolomyia – Stefanivka (1899, 121 km); Jaworzno – Pila (1900, 24 km).

Local railway line Borki Wielkie – Hrymailiv (Polish: *Kolej Lokalna Borki Wielkie-Grzymalów*). The construction of the line began in 1895. On August 12, 1897, a 33,025 km long local line connecting Borki Wielkie and Hrymailiv through Skalat was officially opened with the participation of the Minister for Railways, General Guttenberg (Tomin et al., 2011). Three steam locomotives, namely KkStB 97, 106–107, and 254, operated on the line. The line was owned by the “Joint Stock Company of Local Railways”. In the spring of 1916, during the preparation of the Brusilov offensive, the railway track was completely dismantled by the Russian troops, its rails and ties were used for construction of the Shepetivka – Zbarazh railway line, which was of extremely strategic importance.

The railway line was restored in 1926. On January 1, 1933, it was purchased by the Polish government and transferred to state ownership (Ustawa, 1932).

Local (narrow-gauge) railway line Łupków – Cisna (Polish: Kolej Lokalna Łupków-Cisna) (Kurowska-Ciechańska J., Ciechański A., 2008, pp. 250–254). The construction of the line began in the 1890s. The project was designed by an engineer Albin Zazula. The line was put into operation on January 22, 1898 (according to other sources – in 1895). The line was built to be used for exporting wood from the valley of the Solinka River. The 760 mm wide track had a length of 24.124 km. Italian masons were invited to build bridges, culverts, viaducts, and walls. After the line had been put into operation, powerful sawmills and other processing factories appeared in the valley of the Solinka River. In 1900 – 1904, the line was extended to Beskid and Kalnytsia.

During World War I, the narrow-gauge line was badly damaged as a result of active hostilities: bridges, junctions and roadside structures were blown up. The reconstruction began in 1916. In 1918, the line was transferred to state ownership.

Local line Kraków – Koćmierzów (Polish: Kolej Lokalna Kraków-Koćmierzów). The town northeast of Kraków became famous after the railway line was built there at the end of the 19th century. The route started from the main Kraków railway station, located on the C. K. Privileged North Railway of the Emperor Ferdinand. It was put into operation on February 14, 1898. At that time, the line was 18.91 km long. In 1917, it was reconstructed into a narrow-gauge railway line and used to connect Kraków with the industrial suburbs, Powiśle and the valley of the Nida River (Dzieje kolei Kocmyrzowskiej, 2022).

Local line Siersza – Trzebinia – Skawce (Polish: Kolej Lokalna Siersza – Trzebinia – Skawce). There are significant disagreements regarding the date of construction of this line, as it consisted of two sections: Siersza – Trzebinia and Trzebinia – Skawce. The construction of the above-mentioned sections was held within 12 years.

It is known about the first section that its construction began in 1887, and the section itself was put into operation in 1889 (Koleje losu kolei w Sierszy, 2022). This is possible, because the section was intended for exporting coal from the mine “Artur” (opened in 1884) to Trzebinia, which was located on the C. K. Privileged North Railway of the Emperor Ferdinand. In our opinion, the concession of May 10, 1899, given for the construction of the Siersza – Trzebinia section, could relate to the development of an already existing line.

On August 15, 1899, the Trzebinia – Skawce section was put into operation. The section was built at the expense of the joint stock company “Kolej Lokalną Siersza Wodna – Trzebinia – Skawce”. Juliusz Sigler, administrator of the Potocki family’s estates in Tenczyn, received a concession for its construction and operation.

Considering the great importance of the line, the powiat of Khraniv repeatedly raised the issue of its transfer to state ownership, since, in addition to exporting coal, it provided transportation of passengers.

Local line Deliatyn – Kolomyia – Stefanivka (Polish: Kolej Lokalna Delatyn-Kolomyja-Stefanówka; German: Localbahn Delatyn-Kolomyja-Stefanówka, LDKS) (Klapchuk & Klapchuk, 2007). The study of the route for construction of the line began in 1893 (“Halychanyń”, 02.06.1893). In 1894, a construction project for this line was developed (“Halychanyń”, March 18, 1894; August 14, 1894; January 15, 1895). At the end of the year, the regional department of the Diet of Galicia and Lodomeria submitted the project to the Ministry in Vienna. It was suggested that construction of 28.9 km of road would cost 850,000 zł. The project was considered by the Ministry, and submitted for approval to the Imperial Council (“Halychanyń”, November 16, 1894). After that, the project was submitted to the Austrian Emperor, and he approved the railway line construction in January of 1896 (“Halychanyń”, January 14, 1896).

In May of 1896, the Ministry for Railways allowed to begin preliminary technical works on the Deliatyn – Kolomyia line (“Halychanyń”, on May 18, 1896). In the summer of 1896, the main construction began (“Halychanyń”, on August 08, 1896). Apparently, it stopped for some reason, because a lot of workers gathered in Deliatyn due to unemployment in 1898 (“Halychanyń”, May 28, 1898). This message caused to continue the construction. In July of 1898, the regional governor Badeni personally came to monitor the progress of construction works (“Halychanyń”, June 23, 1898).

The line was built in 1898 – 1899. It had a total length of 112.62 km. The ceremonial opening took place on November 18, 1899. On April 25, 1898, the Galician regional department received a concession for construction. The owner of the line became the joint stock company “Local Railway Deliatyn – Kolomyia – Stefaniwka”. At the beginning of operation, the rolling stock consisted of 6 locomotives, 14 passenger cars and 46 freight cars. In 1910, there were 72 freight cars.

In 1900, the line transported 82 thousand passengers. In 1901, this number increased to 189 thousand people. On the eve of World War I, 230 thousand people were transported by the line. There were passenger cars of four classes of comfort, but the largest number of passengers (86–96%) used Class III cars, which was also common for other Galician railways. 2–4% of passengers used military tariffs. At the turn of the century, 24,300 tons of goods were transported by the line. On the eve of World War I, their amount grew five times and reached 130,000 tons (Szuro, 1997, pp. 171–176).

In 1904–1905, the following trains operated from Kolomyia and Zaliŝchyky to Deliatyn (Tovarysh, 1905, pp. 83–85): from Kolomyia–18-42, to Kolomyia–6-06; from Zaliŝchyky–11-10, to Zaliŝchyky – 16-01.

Local line Chabówka – Zakopane (Polish: Kolej Lokalna Chabówka – Zakopane). The line was put into operation on October 25, 1899. In 1900, an inspection of the route showed a fairly good condition of the track. During the inspection, no significant violations of construction standards were found, except for a few turns near the Nowy Targ station (with a radius of 225 and 130 m instead of the norm of 250 m).

In total, 5 large bridges were built on the railway: across the river of Czarny Dunajec near Nowy Targ (picket 21.4 km, length 70.0 m); across the river of Biały Dunajec (picket 35.6 km, length 55.0 m); across the river of Poronets (picket 38.2 km, length 38.0 m); across the river of Lebidnytsia (picket 30 km, length 30.0 m); across the river of Raba (picket 1.4 km, length 25.0 m). All bridges had an iron structure. They were made and installed by the Vitkovits manufactory, with the exception of the bridge across the river of Poronets, which was made by the Cieszyn manufactory. The Vitkovits manufactory made and installed 23 more small bridges with a length of 2 to 12 m. In addition, there were more than 100 culverts and 148 crossings on the route.

8 stations were built on the line (except for Chabówka, which was built earlier): Raba (picket 5.5 km); Syniava (picket 12.7 km); Lisok (stop, picket 15.2 km); Nowy Targ (picket 22.5 km); Szaflary (picket 26.5 km); Biały Dunajec (picket 34.0 km); Poronin (picket 37.5 km); Zakopane (picket 43.5 km) (Szuro, 1997, pp. 171–176).

At the same time, the construction of the line Kruleviany – Sucha Góra was completed. The connection had several options with the same length of 20 km: 1) from Nowy Targ through Czarny Dunajets; 2) from Zakopane through Kostelysk, Vitiv and Khokholiv.

Local line Pila – Jaworzno with a length of 25.831 km was built within a year and put into operation on October 27, 1900.

Local line Lviv–Belzec (Tomaszów) (Polish: Kolej Lokalna Lwów–Belzec (Tomaszów).

The first attempts to get a concession were made in 1869. Only on January 8, 1886, the concession was given. On May 15, 1886, the concession terms on the route Lviv – Zhovkva – Rava-Ruska – Belzec – Tomaszów were agreed with the Lviv – Chernivtsi – Iași Railway. The contract for construction was signed on June 23, 1886 (Reichsgesetzblatt, 1886, p. 90). The 88.42 km long track was put into operation on October 23, 1887. 12 stations and 3 stops were built on the line.

On July 1, 1889, the line was transferred to ownership of the Austrian State Railways (kkStB). The section to Zovkva was leased on January 1, 1909. After the end of World War I, it was transferred to the newly created Polish State Railways (PKP). On February 4, 1932, the company was nationalized (Eisenbahn Lemberg, 2022).

Local line Lviv (Klepariv) – Yavoriv (Polish: Kolej Lokalna Lwów (Kleparów) – Jaworów). In 1893, a project for the construction of a standard railway line Lviv (Klepariv) – Yavoriv was designed on the initiative of the Galician Mortgage Bank in Lviv, Count Wilhelm Semensky-Levytsky and Count Roman Potocki. The concession was given on January 1, 1895. The 22.252 km route from Lviv to Yaniv was put into operation on November 25, 1895. The section Klepariv – Riasne was a part of the line Lviv – Belzec. On November 28, 1898, the line Lviv (Klepariv) – Yaniv line was extended to Yavoriv (the concession was given on December 14, 1902). The section from Yaniv to Yavoriv with a length of 31.223 km was opened on November 4, 1903. Thus, the total length of the route was 53.569 km.

On October 31, 1895, the line was transferred to ownership of the Austrian State Railways. Until January 15, 1904, it was provided to operational management. After the end of World War I, it became the property of the Polish State Railways (PKP) (Lokalbahn Lemberg – Kleparów, 2022).

Local (narrow-gauge) line Przeworsk – Dynów (Polish: Kolej Lokalna Przeworsk – Dynów; German: Schmalspurige Localbahn Przeworsk – Dynow, SLPD). The construction of the narrow-gauge line Przeworsk – Dynów through the valley of the river of Mlecza was caused by the need to transport raw materials and products to Przeworsk sugar factory. The length of the track was 46.248 km; the track width was 760 (later 750) mm. The route has a 602 m long tunnel and several 10–15 m long bridges.

The construction began at the end of the 19th century, when prince Andrij Liubomyrsky launched a sugar factory in Przeworsk. The idea of construction and the preliminary project were initiated by the owners of the surrounding lands, counts Roman Scipior from Velyka Lopushka and Skshinsky from Bakhirja. The concession for construction was given in the name of prince Andrij Liubomyrsky on February 15, 1902. On September 8, 1904, the construction was completed.

In 1904, 3 locomotives, 7 passenger cars and 45 freight cars operated on the line; in 1913, there were 4 locomotives, 7 passenger cars and 65 freight cars (Szuro S., 1997, pp. 201–206). In 1913, 110,000 passengers were transported by the line. In 1905, the railway transported 45,000 people. Until 1913, there were Class II and III cars. In 1913, Class I cars were put into operation. However, 90–96% of passengers used Class III cars.

In 1905, 25,800 tons of freight was transported by the line. In 1911, the weight of freight transported by the line reached 48,900 tons.

Local line Ternopil – Zbarazh (Polish: Kolej Lokalna Tarnopol – Zbaraz) with a length of 22.478 km was built within a year and put into operation on February 25, 1906.

Local line Tarnów – Szczucin (Polish: Kolej Lokalna Tarnów – Szczucin) with a length of 48.571 km was built within a year and put into operation on October 15, 1906 (Linia kolejowa nr 115, 2022).

Local line Lviv – Pidhaitsi (Polish: Kolej Lokalna Lwów – Podhajce; German: Localbahn Lemberg – Podhajce, LBLP) (Szuro, 1997, pp. 219–224). The construction of the 141.13 km line lasted from 1905 to 1909. The first section (Lviv – Kurovychi) with a length of 35.91 km was completed on December 15, 1908. The construction of the second section (Kurovychi – Vovkiv; 34.3 km) was finished on February 25, 1909. The third section (Vovkiv – Pidhaitsi; 70.92 km) was put into operation on October 29, 1909, which was the official opening date of the railway. However, some sources give the total length of the line as 131.1 km (Kolej lokalna Lwów – Podhajce, 2022).

The concession for construction was given to prince Roman Potocki, prof. Adam Chyzhevych and Adam Treter on August 19, 1905. The owner of the track was the joint stock company “Local Railway Lviv – Pidhaitsi”. The State Treasury gave the concessionaires guarantees for 4% of annual line income from the invested capital (in 1909, the amount of that capital was 18.1 million Kr).

From 1908 to 1914, 11 locomotives, 10 passenger cars (in 1909 and 1912, there were 19 and 28 passenger cars, respectively) and 28 freight cars operated on the line. In 1909, 138,000 passengers were transported by the line. That number gradually increased and reached 435,000 people in 1913. 0.07–0.13% of passengers (770 people a year on average) used Class I cars, 6.8–9.8% of passengers used Class II cars, 87–89% of passengers used Class III cars. In addition, 2.6–5.0% of passengers used military tariffs. Class IV cars were hardly ever used on the line.

In 1909, 27,900 tons of freight was transported by the line. Their number grew every year: 66,000 tons in 1910; 100,000 tons in 1911; 112,000 tons in 1912.

Local line Lviv – Stoyaniv (Polish: Kolej Lokalna Lwów – Stojanów) with a length of 86,995 km was built within a year and put into operation on October 18, 1909.

Local line Muszyna – Krynica (Polish: Kolej Lokalna Muszyna – Krynica). The railway with a length of 10,026 km was built within a year and put into operation on May 25, 1911. It was built for transporting vacationers from the existing station in Muszyna (on the line Orłow – Nowy Sącz) to the Krynica resort.

In 1939, 13 pairs of trains operated on the line. Four of that trains were express trains to Lviv, Kraków and Warsaw (Linia kolejowa nr 105 Muszyna – Krynica, 2022).

Local line Drohobych – Truskavets (Polish: Kolej Lokalna Drohobycz – Truskawiec). The 12.048 km long line was built within a year and put into operation on June 1, 1912. The cost of construction was 1.3 million Kr.

In the newspaper “Kuryer Drohobycki” (Kuryer Drohobycki, 1896, p. 1), the following reports periodically appeared: “Getting to Truskavets is easy and convenient. Drohobych is the nearest railway station, which is 11 kilometers away from Truskavets. Drohobych is connected by a railway network with all the towns of Galicia, so that you can easily get to the resort from all directions. Now, at the guests’ request, the resort sends a carriage at a price of 3 Fl to each train at Drohobych station. In addition, there are numerous carriages and coaches, bringing guests to their destination at a stipulated price ...”. The residents of Drohobych themselves rarely travelled to Truskavets, as the station was far from the town centre.

Kolomyia local railway (Polish: Kolomyjskie Koleje Lokalne). The construction of the railway was initiated by doctor of law Karl Malyj from Lviv, general inspector of the Lviv – Chernivtsi – Iași Railway Liudovyk Verbytsky, and industrialist Stanislav Prus Ritter von Szczebanovsky in 1883. The concession for construction was given on December 15, 1885 (Reichsgesetzblatt, 1886, p. 71). The charter was approved on April 20, 1887. Thus, on May

18, 1887, the company “Kolomyia Local Railway” was established with its headquarters in Kolomyia.

The railway consisted of the following lines: Kolomyia – Słoboda Rugurska (25.612 km + 7.132 km to the mine) with the sections Kolomyia – Pechenizhyn (opened on October 1, 1886); Pechenizhyn – Słoboda Rungurska – mine (opened on December 1, 1886); suburb of Nadvirna – Shchepanivtsi (Kniazhdvir) (opened on October 1, 1886).

The railway provided transportation of oil to the refineries in Kolomyia and Nyzhnij Verbizh, and was nationalized on July 1, 1889. The project to extend the line to Yabluniv failed to be implemented due to financial problems and unprofitability of oil production there. During World War I, the Kniazhdvir section was destroyed and remained unrestored after the end of hostilities. The rest of the railway was privately owned from 1918 to January 1, 1939, and after then it was nationalized (Kolomeaer Lokalbahnen, 2022).

Bukovyna local railway (Polish: Bukowińska Kolej Lokalna; German: Bukowinaer Lokalbahnen – BLB). The railway belonged to the joint stock company “Bukovyna Local Railway”, which was established during June 5 – July 2, 1883, and approved on July 15, 1883 in the name of the concessionaires Alexander Baron von Petrinho, Heinrich Popper, Baron Nikolaus von Mustatz, Stefan Stefanowicz, and Dr. Johann Zott. The “de facto” founding date was June 12, 1886.

The Chernivtsi – Novoselytsia line was transferred to the above-mentioned joint stock company. It was legally formalized by local authorities with the law of May 25, 1880 and December 26, 1882. The railway line was opened on July 12, 1884. It reached the border with Russia in Novoselytsia and was connected with the line Novoselytsia – Larga – Ocnița – Bălți (Ziffer, 1908).

The company owned the following lines:

- Chernivtsi – Novoselytsia (opening date – July 12, 1884; length – 30.831 km; on January 1, 1894, the line was transferred to state ownership);
- Hlyboka – Berehomet-upon-Siret with the branch Karapchiv – Chudyn (November 30, 1886; 52.924 km; branch length – 18.710 km);
- Berehomet-upon-Siret – Mezhybrody – Lopushna (November 15, 1909; 14.621 km);
- Hatna – Dorna Vatra with the following sections: Hatna – Câmpulung (May 1, 1888; 66.866 km); Câmpulung – Valeputna (January 9, 1901; 18.984 km); Valeputna – Iacobeni – Dorna Vatra (October 29, 1902; 22.971 km);
- Pojorâta – Luisenthal / Fundu Moldovei connecting section (August 25, 1906; 6.246 km);
- Hadikfalva – Rădăuți (November 17, 1889; 8.140 km; on July 1, 1898 transferred to ownership of the joint stock company “New Bukovyna Railways”);
- Vama – Rușii Moldovița connecting section (August 15, 1889; 20.059 km);
- Chudyn – Koschuya narrow-gauge railway line (October 15, 1908; 22.554 km).

The Câmpulung – Dorna Vatra line was given to concession on October 23, 1899. The Chudyn – Koschuya railway line was given to concession on January 18, 1907, and later on January 16, 1911 (Reichsgesetzblatt, 1911, p. 84).

The Lviv – Chernivtsi – Iași Railway was transferred to ownership of the Austrian State Railways due to its unprofitability on July 1, 1889.

The Bukovyna local railway existed until the end of World War I. After that, it was liquidated and became a part of the Romanian Railways (German: Rumänische Staatseisenbahngesellschaft). The rolling stock of the railway included: 25 steam locomotives, 11 passenger cars, 107 freight cars, three work cars, 12 tractors.

Local line Chernivtsi – Suceava (89 km). The line covered the route Chernivtsi – Hlyboka-Bukovynska – Ițcani – border with Austria-Hungary (to Roman).

On September 1, 1866, Chernivtsi was connected with Lviv. Therefore, it was necessary to build local railways. On May 15, 1867, a consortium was formed to build a railway section to Suceava and extend it to the Austrian-Romanian border (Reichsgesetzblatt, 1867, p. 179).

The concession suggested the completion of construction works by the end of 1869. One of the reasons for such a fast start of the construction was the intention to allow transportation of passengers, raw materials, agricultural and forestry products from the periphery of the region. Despite the unfavorable conditions of the area, it was planned to open the section on October 28, 1869 (Prochaska, 1898, pp. 34–37). The section was put into operation on December 15, 1869, and the government of Romania decided to connect it with the railways of other countries by means of using the section Suceava – Roman. The Austro-Romanian border was to the south from the station Ițcani (Bukowinaer Lokalbahnen, 2022).

Despite the importance of the route, the project could not be realized due to difficult economic conditions in Bukovyna and in the north of Moldova. During the period of 1872–1875, the railway line was administered by the Austrian government through regional railway branches. During the period of 1889–1894, it was administered by the state (Röll, 1915, pp. 96–97).

Local line Hlyboka – Berehomet (53 km). The railway line and its section Karapchiv – Chudyn were opened on November 30, 1886. On July 1, 1889, the Lviv – Chernivtsi – Iași Railway transferred them to the Austrian State Railways.

On November 15, 1909, the line was connected with the section Siret – Mezhybrody – Lopushna (14.621 km). The line's part to Mezhybrody existed since 1886 and was 9.2 km long. In 1913, passenger transportation was stopped due to its unprofitability. In 1916, the line was partially captured by Russian military troops. After World War I, the line was transferred to the Romanian State Railways (Căile Ferate Române).

The consortium "**New Bukovyna Railways**" (*Neue Bukowinaer Lokalbahn-Gesellschaft – NBLG*) was "de jure" established on September 25, 1895. Its "de facto" establishment was in 1897. The railway included standard and narrow-gauge lines (Konzessionsurkunde, 1895, p. 603).

The company owned the following lines: Hlyboka – Siret (opening date – on January 1, 1897; length – 18.265 km); Ițcani – Suceava (on January 1, 1897; 4.851 km); Rădăuți – Brodina (July 7, 1898; 41.371 km); the Karlsberg – Putna connecting section (5.456 km); Napolokivtsi – Vyzhnytsia (on July 7, 1898; 43.914 km); Luzhany – Zalishchyky (on July 12, 1898; 43.541 km; connected with the section Zalishchyka – Chortkiv in Zalishchyky); Hadikfalva – Rădăuți (on July 1, 1898; 8.140 km; purchased by the state on November 17, 1889); Vereshchanka – Okna (23.246 km) with the following sections: Vereshchanka – Iurcouți (on October 17, 1909); Iurcouți – Okna (on January 1, 1910); Siret – Sinouți – state border (on June 27, 1911; 5.735 km); the Brodina – Seliatyn narrow-gauge line (20.951 km) with the following sections: Brodina – Sipitul (on August 10, 1912); Sipitul – Seliatyn (on October 26, 1913).

The first five routes were given to concession in 1883, the Vereshchanka – Okna line was given to concession on February 19, 1907, and January 9, 1909 (Konzessionsurkunde, 1907b, p. 372). They were transferred to the Austrian State Railways due to their bankruptcy. After World War I, the line was transferred to the Romanian State Railways.

Local line Chudyn – Koschuya with a gauge width of 760 mm was the only narrow-gauge railway line in Bukovyna.

The forest owners Oleksandr Ritter von Goyan and August Ritter von Goraysky initiated a project on the construction of a narrow-gauge railway to exploit forest resources in the vicinity of Hulcze and Koschuya. The railway should be connected with the local standard line Hlyboka – Berehomet – Siret in Chudyn. The concession for construction of the line was received on January 18, 1907. On October 15, 1908, the line was opened (Konzessionsurkunde, 1907a, p. 113).

In the following years, the need for passenger transportation increased. On January 16, 1911, the license was extended (Konzessionsurkunde, 1911, p. 84). After World War I, the railway was transferred to the Romanian State Railways (Lokalbahn Czudin – Koszczuja, 2022). During the period under study, the railway used 40 steam locomotives (Steam locomotives of the Bukovyna local railway, 2022).

The Conclusions. The construction of local railways became possible with the assistance of enterprises that built the first main railway arteries in Galicia. At the end of 1890, there were 41 km of such access lines in Galicia, including: 13.3 km on the C. K. Privileged North Railway of the Emperor Ferdinand; 6.5 km on state railways; the 23.8 km long line Tlumach – Palahychi; 3.9 km along private railways.

By the end of 1890, there were 892.5 km of local railways. Railways were built at the expense of local budgets or private investments under the guarantee of the Diet of Galicia and Lodomeria. During the period of 1896 – 1912, 940.835 km of railways were built with a total cost of 95 million Kr.

At the beginning of the 20th century, more than 37.3 thousand trains operated on 15 private local railway lines with a total length of 811 km. In 1902, they transported almost 1,750 thousand passengers and over 138,000 tons of freight. In Bukovyna, at the beginning of the 20th century, there were 16 railway lines with a total length of over 520 km.

In terms of the length of local railways, Galicia ranked second among the 14 crown regions of Austria, although in terms of density per 100,000 people, it was only in 12th place. There was one kilometer of railway track per 7,054 people.

Local railways built in Eastern Galicia during 1896 – 1898 had a total length of 339.4 km. They consisted of eight separate lines: Ternopil – Kopychyntsi; Pidwysokie – Berezovytsia-Ostriv; Halych – Pidwysokie; Khodoriv – Pidwysokie; Bila Chortkivska – Zalishchyky; Vyhnanka – Teresin – Skala; Teresin – Borschiv; Borshchiv – Ivanove Puste. During the period of 1898, 163 thousand passengers were transported by the railway. By 1913, their number had increased to almost 0.5 million people. In 1898, all eight railway lines transported only 80,600 tons of freight. By 1913, their number had increased 4.5 times. The maximum was reached in 1905, when 312 thousand tons of goods were transported.

During the period under study, the following local lines were put into operation: Borki Wielkie – Hrymailiv; Łupków – Cisna; Kraków – Koćmierzów; Siersza – Trzebinia – Skawce; Deliatyn – Kolomyia – Stefanivka; Chabówka – Zakopane; Pila – Jaworzno; Lviv – Belzec (Tomaszów); Lviv (Klepariv) – Yavoriv; Przeworsk – Dynów; Ternopil – Zbarazh; Tarnów – Szczucin; Lviv – Pidhaisi; Lviv – Stoyaniv; Muszyna – Krynica; Drohobych – Truskavets.

The Kolomyia local railway consisted of the following lines: Kolomyia – Słoboda Rungurska with the sections: Kolomyia – Pechenizhyn; Pechenizhyn – Słoboda Rungurska – mine; the suburb of Nadvirna – Shchepanivtsi (Kniazhdvir). On July 1, 1889, it was nationalized. During World War I, the Kniazhdvir section was destroyed and remained unrestored. The rest of the railway was privately owned from 1918 to January 1, 1939, and after then it was nationalized.

The Bukovyna local railway, which belonged to the joint stock company “Bukovina Local Railway”, included the following lines: Chernivtsi – Novoselytsia; Hlyboka – Berehomet-upon-Siret with the branch Karapchiv – Chudyn; Berehomet-upon-Siret – Mezhybrody – Lopushna; Hatna – Dorna Vatra with the sections: Hatna – Câmpulung; Câmpulung – Valeputna; Valeputna – Iacobeni – Dorna Vatra; the connecting section Pojorâta – Luisenthal / Fundu Moldovei; Hadikfalva – Rădăuți; Vereshchanka – Rușii Moldovița; Chudyn – Koschuya.

The consortium “New Bukovyna Railways” was created “de jure” on September 25, 1895, “de facto” in 1897. It included standard and narrow-gauge railway lines: Hlyboka –

Siret; Ițcani – Suceava; Rădăuți – Brodina; Karlsberg – Putna; Napolokivtsi – Vyzhnytsia; Luzhany – Zalishchyky (connected with the Zalishchyky – Chortkiv section in Zalishchyky); Hadikfalva – Rădăuți; Vereshchanka – Okna; Siret – Sinouți – state border; Brodina – Seliatyn (with the sections Brodina – Sipitul and Sipitul – Seliatyn).

Acknowledgements. The authors express their sincere gratitude to all members of the editorial board for their advice during the preparation of the article for publication.

The Funding. The authors received no financial support for the research, authorship, and/or publication of this article.

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*The article was received March 22, 2024.
Article recommended for publishing 29/11/2024.*

UDC 94:061.2(477):050:94](477)(092)
DOI 10.24919/2519-058X.33.317457

Taras BATIUK

PhD (History), Assistant Professor of Ukrainian History and Law Department, Drohobych Ivan Franko State Pedagogical University, 24 Ivan Franko Street, Drohobych, Ukraine, postal code 82100 (tbatyuk@gmail.com)

ORCID: 0000-0003-4159-5226

ResearcherID: C-1506-2019

Mykola PALINCHAK

PhD (History), PhD hab. (Political Sciences), Professor, Dean of the Faculty of International Economic Relations, Uzhhorod National University, 14 Universytetska Street, Uzhhorod, Ukraine, postal code 88000 (palinchakmm@gmail.com)

ORCID: 0000-0002-9990-5314

Тарас БАТЮК

кандидат історичних наук, доцент кафедри історії України, Дрогобицький державний педагогічний університет імені Івана Франка, вул. Івана Франка, 24, м. Дрогобич, Україна, індекс 82100 (tbatyuk@gmail.com)

Микола ПАЛІНЧАК

кандидат історичних наук, доктор політичних наук, професор, декан факультету міжнародних економічних відносин Ужгородського національного університету, вул. Університетська, 14, м. Ужгород, Україна, індекс 88000 (palinchakmm@gmail.com)

Bibliographic Description of the Article: Batiuk, T., & Palinchak, M. (2024). Myron Korduba and “Notes of the Shevchenko Scientific Society”: cooperation features. *Skhidnoievropeiskyi Istorychnyi Visnyk [East European Historical Bulletin]*, 33, 93–103. doi: 10.24919/2519-058X.33.317457

MYRON KORDUBA AND “NOTES OF THE SHEVCHENKO SCIENTIFIC SOCIETY”: COOPERATION FEATURES

Abstract. *The purpose of the research is to make an attempt regarding a complete reconstruction of the cooperation between the renowned Ukrainian historian Myron Korduba (1876 – 1947) and the scientific journal “Notes of the Shevchenko Scientific Society”. The methodology of the research is based on the combination of principles traditional for the historiographic studies (historicism, objectivity, holism and systematicity, as well as a value approach to the object of study) and general scientific (comparison, generalization, analysis and synthesis) and special historical (historical genetic, historical comparative, historical typological and historical psychological) methods of studies. The scientific novelty of the research: on the basis of a wide range of sources (studies, reviews, chronicle materials) to reproduce the features of M. Korduba’s cooperation with “Notes of the Shevchenko Scientific Society”. Conclusions. The conducted research proved that M. Korduba developed as a researcher and reviewer in a real creative laboratory “Notes of the Shevchenko Scientific Society”. The scholar developed a critical style of historical thinking, mastered modern practices of source*

research, and mastered the theoretical and methodological tools of the time due to professional advice given by Mykhailo Hrushevskyy, a teacher and editor-in-chief of the journal as well as his own hard work and determination. Thus, a talented public intellectual emerged, who affirmed M. Hrushevskyy's historiographical model consistently, substantiating his research with the maxims of the cultural uniqueness and territorial integrity of the Ukrainian people. Hence, he became one of the most popular authors of "Notes of the Shevchenko Scientific Society", as evidenced by the favourable professional reception and mass reprinting of many articles in the form of brochures. In general, the multi-genre posts of M. Korduba on the pages of "Notes of the Shevchenko Scientific Society" are an important part of the magazine's intellectual heritage, which in many cases continues to be relevant. It is an important task of modern historiography to take this legacy into account.

Key words: M. Korduba, "Notes of the ShSS", cooperation, reception, intellectual biography.

МИРОН КОРДУБА ТА "ЗАПИСКИ НАУКОВОГО ТОВАРИСТВА ІМЕНИ ШЕВЧЕНКА": ОСОБЛИВОСТІ СПІВПРАЦІ

Анотація. Мета дослідження полягає у спробі цілісної реконструкції співпраці М. Кордуби із "Записками НТШ". **Методологія дослідження** спирається на традиційне для історіографічних праць поєднання принципів (історизму, об'єктивності, холізму і системності, а також ціннісного підходу до об'єкта вивчення) та загальнонаукових (порівняння, узагальнення, аналізу і синтезу) і спеціально-історичних (історико-генетичний, історико-порівняльний, історико-типологічний та історико-психологічний) методів наукової праці. **Наукова новизна** статті: на підставі широкого кола джерел (розвідки, рецензійні огляди, хронікальні матеріали) відтворити особливості співпраці М. Кордуби із "Записками НТШ". **Висновки.** Проведене дослідження переконливо довело, що "Записки НТШ" постають справжньою творчою лабораторією, в якій М. Кордуба сформувався як дослідник і рецензент. Завдяки професійним порадам вчителя та головного редактора часопису, а також власній працьовитості й цілеспрямованості, вчений виробив критичний стиль історичного мислення, засвоїв модерні практики джерелознавчої праці, опанував тогочасний теоретико-методологічний інструментарій. Відтак постав талановитий публічний інтелектуал, який послідовно утверджував історіографічну схему-модель М. Грушевського, узасаднюючи своїми дослідженнями максими культурної самобутності та територіальної соборності українського народу. Таким чином він став одним із найбільш популярних авторів "Записок НТШ", про що свідчить прихильна фахова рецензія та перевидання масовими накладами багатьох статей у вигляді брошур. Загалом же, різножанрові дописи М. Кордуби на сторінках "Записок НТШ" становлять вагомий складову інтелектуальної спадщини часопису, що в багатьох моментах надалі зберігає свою актуальність. Врахування цієї спадщини є важливим завданням сучасної історіографії.

Ключові слова: М. Кордуба, "Записки НТШ", співпраця, рецензія, інтелектуальна біографія.

The Problem Statement. There is a special place, which is given to the issue on Myron Korduba's cooperation with periodicals in his creative biography. It is about the fact that a graduate of Lviv School of the Ukrainian Studies wrote the first scientific and journalistic texts that were published in the periodicals, determining him as a renowned public intellectual in the Ukrainian environment. Taking the above-mentioned into account, this plot is present to one degree or another in almost all essays on the scholar's life and work. However, scholars who specialize in Korduba studies (korduboznavtsi) are traditionally more interested in the facts of the historian's cooperation with social and political press than with purely scientific journals. It could be explained by a significantly wider circle of the admirers of his public journalism, and hence its greater influence on the contemporaries. At the same time, this approach marginalizes the legacy of Korduba unjustifiably, the popularizer of historical knowledge, presented on the pages of numerous scientific periodicals. We will try to reconstruct the collaboration between the scholar and the leading Ukrainian studies

periodical "Notes of the ShSS" of that time in order to draw colleagues' attention to such a contraversional and thematic imbalance in modern Korduba studies

The Review of Recent Research. Numerous scholars studied the issues on cooperation between M. Korduba and the Shevchenko Scientific Society and its periodicals. However, such attention covered all areas of the scholar's activity equally as an active member of the unrecognized Galician Academy of Sciences. Two scholars, Iryna Fedoriv and Tetiana Kulchytska provided the most detailed information on the cooperation between M. Korduba and the Shevchenko Scientific Society and its "Notes" (Fedoriv, 2004; Kulchytska, 2010). The above-mentioned issue was briefly covered by Oleh Pikh (Pikh, 2012, pp. 13–23), Yuriy Polishchuk (Polishchuk, 2019, pp. 59–128), Vitaliy Telvak (Telvak, 2017; Telvak, Zhuravlov & Vladyga, 2023) and Vasyl Pedych (Telvak & Pedych, 2016, pp. 54–83), Vasyl Ilnytskyi, Mykola Haliv, Vasyl Menko (Ilnytskyi & Haliv, 2022; Haliv & Menko, 2023). However, the above-mentioned scholars only noted the fact of cooperation between the Galician intellectual with the "Notes of the Shevchenko Scientific Society", without delving into numerous aspects of the issue. Hence, the **relevance** of the research topic was determined.

The purpose of the research is to make an attempt regarding a complete reconstruction of M. Korduba's collaboration with "Notes of the Shevchenko Scientific Society".

The Results of the Research. The issue on establishing M. Korduba's cooperation between the Shevchenko Scientific Society and its scientific body should be considered in a general context of the Ukrainian studies development in Galicia at the end of the 19th century. As it is well-known, M. Hrushevskyi moved to Lviv and in order to have Professor position in 1894, and he began systematic work on the training of young scientific personnel on the basis of the ShSS, which he headed in 1897 (Pyrih & Telvak, 2021, pp. 102–117). One of the important stages of the scientific education of young people in the understanding of a prominent scholar was their involvement in the publications of the Society, first of all, in the "Notes of the Shevchenko Scientific Society" edited by him from the moment of his arrival in Lviv (Telvak, 2016; Telvak, Pedych & Telvak, 2021). In his memoirs M. Korduba depicted in an extremely colorful way the process of transformation by M. Hrushevskyi of his pupils into the employees of the leading Ukrainian studies press. The historian wrote the following: "The Professor dragged us, his students, to the review department". – It seemed strange to us at once, because they did not feel that they were prepared appropriately to discuss or even criticize the specialists' works. But Hrushevsky was able to dispel doubts and lack of confidence quickly. He handed out a book from those to be discussed to each of them and told them to read it. Then he gave me a piece of advice to compare what I had read with one or another older work on this topic, and during the tapes, I asked him about the results of the comparison, the impression that the new book made, etc. After listening patiently to the oral essay, he threw in his notes here and there, gave a word to the wise, in particular, to pay attention to one or another point of view, and summarized it the following way: "Now, comrade, try to write it all down". That's how he made out of the 18-20 years old the reviewers' guys, and that's how the first student reviews appeared in "Notes" (Korduba, 1916, p. 796).

Thus, there began M. Korduba's long-term fruitful cooperation with "Notes of the ShSS". The scholar published more than fifty diverse publications in the columns of the periodical during this time – from a small debut student article to solid studies on the eve of the war. These texts constitute a significant part of the scholar's historiographic work. There will be presented their analysis below according to the genre criterion of M. Korduba's posts – research, reviews, chronicle materials, etc.

The article studies written by M. Korduba were the most significant for the progress of Ukrainian historiography. Their problem-thematic range for almost forty years is impressive in its breadth, because it is about studies on little-known subjects of the Ukrainian past from the Middle Ages to the end of the 19th century. The first research was dedicated to the oldest known Slavic state Samo, which existed on the territory of the modern Czech Republic and Lower Austria in the 6th century. M. Hrushevskiy, having learned about these creative plans of the student, promised to publish the research on the pages of "Notes of the ShSS" and gave a piece of advice him to start it with "a general overview of the political situation in which Samo spoke, and a review of the opinions expressed in the literature" (Kupchynskiy, 2016, p. 102). As evidenced by the correspondence between the teacher and the student, the entire process of writing the first article by M. Korduba coordinated with the mentor. The mentor gave a lot of pieces of advice, teaching the novice historian patiently the secrets of the profession. Hence, expressing his impression of the sent manuscript of the work, M. Hrushevskiy explained angrily the following: "As for your article [...], I could say: a) there is the lack of transparency, difficult way of presentation: when clarifying a thesis, the main argumentation and conclusions are not distinguished from the introductory and secondary arguments, the primary arguments are not put forward in comparison with the secondary ones; b) it is interpreted more with the hints, as if the matter is well-known, a full and detailed presentation is not given, and contradictory or unclear points are put forward, which can result in "some attention" instead of the covering the whole case. When writing, you must consider the reader, who does not know anything about this matter, and you, while eliminating some extraneous questions with the hints, cannot also avoid the [main] issues; c) for the same reason, the most important texts, especially where one or another interpretation is important, should be cited, even if it is their edition, because at least this is needed for easier orientation. I raised these points, and although now I point them out more sharply, this is for a clearer understanding. Pay attention to this in the future" (Kupchynskiy, 2016, p. 108).

M. Korduba delayed the research publishing about the Samo state following his teacher's advice, however, such a delay was beneficial to its scientific level. As a result, the young researcher, having carefully processed the available sources and literature of the subject, reconstructed the arrival of the Slavs on the territory of the Moravians, the Czechs, and the Sorbs for the first time in Ukrainian historiography; studied their relations with the Avars and the struggle with the Franks; hence, focused on expanding the borders of the Samo state and analysed its socio-political system (Korduba, 1896a).

The issues on the Middle Ages were also covered in the articles written by M. Corduba in the course of his doctorate "History and Relations in Galicia Kniazivstvo until the middle of the 13th century", prepared on the initiative and under the supervision of M. Hrushevskiy (Batiuk & Markova, 2022) and defended at the University of Vienna in 1898 under the formal guidance of Max Budinger (Telvak & Polishchuk, 2020). This is, first of all, a thorough study of "Social Strata and Political Parties in Galicia Kniazivstvo until the middle of the 13th century" (Korduba, 1899). The scholar reconstructed the structure of ancient Ruthenian society for the first time on the basis of Kyivan, Galicia-Volyn and Lavrentiyiv chronicles, as well as a number of Western European chronicles comprehensively. First of all, he clarified the phenomenon of the Galician boyarstvo, then he turned to the characteristics of the position of the masses (the serfs, the peasants, the burghers), thus, depicting the role of the Kniaz (Prince), his troops and the government officials. Separately, the author analysed the economic processes in Galicia, kniazivstvo noting their influence on the dynamics of social

and political life. It is interesting that the editor-in-chief did not agree to all the conclusions of his pupil. M. Hrushevskiy pointed out in a note to the article the following: "In presenting this research, the editors must admit that some theses of the respected author can hardly be accepted [...]. But [...] the study contains many interesting observations that will, we hope, be gratefully received by all who study our ancient history" (Korduba, 1899, p. 1).

M. Korduba became interested in ethnological issues, namely the Ukrainian pysankarstvo at the same time with the medieval plots development. He was absorbed by a new passion, thus, collected, described and made drawings of the Easter eggs actively from different areas of Eastern Galicia during the second half of the 1890s. A young historian shared his new passion with the teacher and received full organizational and material support from him. Hence, M. Hrushevskiy gave a piece of advice to his student to consult the eminent Ukrainian ethnologist Fedir Vovk regarding this case. There was published a questionnaire compiled by novice and experienced ethnologists on the pages of "Notes of the ShSS". M. Korduba addressed the Galician community with a request for help in creating a collection of Easter eggs in it and noted the following: "Taking into account the position that every reason for the knowledge of our people is a valuable achievement, I decided to study the custom of painting eggs on Easter. I was motivated to do this primarily by the fact that this custom is slowly beginning to be vanish" (Korduba, 1896b, 1). As a result, the Galician scholar managed to collect a representative collection of Easter eggs, which became the basis for several innovative studies, however, published on the pages of "Notes of the ShSS".

The next thematic block of publications by M. Korduba is directly related to the plans of the Head of the Shevchenko Society to comprehensively study the phenomenon of the Ukrainian Cossacks on the pages of "Notes of the ShSS". M. Hrushevskiy divided the periods of the Cossack history among the students for further thorough study (Telvak & Pedych, 2016, p. 73). M. Korduba chose the era of Khmelnytskyi, in particular, the little-known issue on the prominent Hetman's diplomacy at that time. The first of a series on the Cossack studies publications was the research about the Venetian embassy to Khmelnytskyi in 1650, written on the basis of the correspondence of the Venetian ambassador in Vienna, N. Sagredo, with A. Vimina, found by the scholar. M. Korduba proved that the task of the mission headed by A. Vimina was to obtain the consent of B. Khmelnytskyi to support Venice in the war with Turkey while reconstructing the above-mentioned event. An important feature of the historian's Cossack studies, published in "Notes of the ShSS" should be noted. It is about their powerful archeographic support, which consisted of extensive source appendices to published articles. For example, the above-mentioned M. Korduba's study was accompanied by the publication of 29 letters from the Vienna archive for 1649 – 1650. (Korduba, 1907).

M. Korduba deepened the Cossack diplomacy issues in subsequent publications on the pages of "Notes of the ShSS". Therefore, he reconstructed the interesting issue of attempts to establish contacts between Khmelnytskyi and Poland through the Austrian mediation (Korduba, 1908). It should be mentioned that another page of the Cossack diplomacy, in particular, the relations of Semihorod with Ukraine and Poland in the period between the battles of Zborovo and Zamosti, also became the focus of his research attention (Korduba, 1922). It should be highlighted that M. Korduba found the solid source basis of these studies, written on the basis of many archival documents in Ukrainian, Polish, Russian and Western European collections. It should be noted that M. Hrushevskiy, as the inspirer of the Galician historian's interests in the Cossack studies, valued these studies of his pupil highly. It could be evidenced by the abundant references of the renowned scholar to his

research in the “History of Ukraine-Rus”. Furthermore, during the interwar period, in a letter to M. Korduba, M. Hrushevskiy confessed to the following: “I must admit, however, that I especially appreciated your studies on the history of diplomacy, and I think even now that in this field, your work would probably be more valuable – especially on the Ukrainian diplomacy in the West! For example, Khmelnytskyi – Rakochi” (Kupchynskiy, 2016, p. 220).

Numerous biohistoriographical studies written by M. Korduba were published on the pages of “Notes of the ShSS”. The first study focused on covering Mykhailo’s Maksymovych heritage as a researcher of the Ukrainian toponymy. Having, at the time of writing the study, considerable work of his own in the field of historical geography (Polishchuk, 2019, pp. 197–220), the Galician scholar reproduced the first experiments on the Ukrainian geographical names comprehensively. He proved that the first Rector of Kyiv University should be considered a pioneer of the national toponymy, since he laid the foundations of the theory and practice of researching geographical names in our lands (Batiuk, 2015).

M. Korduba’s extensive study on the Warsaw period of Panteleimon Kulish’s life and work was no less innovative. The scholar reconstructed the previously little-known and stereotyped by historiography page of P. Kulish’s biography in the most complete way to date on the basis of documents found for the first time in the Warsaw archives, as well as numerous contemporary epistolaries. It is about his return to active scientific and public life after years of exile for participating in the Cyril and Methodius Brotherhood. The scholars of that time unanimously depicted this period in dark colors, accusing P. Kulish of betraying the Ukrainophile ideals of the youth. For the first time, M. Korduba undermined this stereotype and showed that, having officially accepted the duties of the leader of the tsarist national policy on the Polish lands, the author of the “Black Council” at the same time contributed to the Ukrainization of the territories of Chelm region and Podlachia, as well as contributed to the growth of the cultural and educational level of the Galicians greatly (Korduba, 1930). M. Korduba’s persuasive observations added 36 documents published by him in the supplement to the research. There were official characteristics on P. Kulish; the government correspondence regarding appointments of the historians to various positions; the extracts from important administrative documents, etc.

Diverse critical and bibliographic studies of the Galician historian also appeared on the pages of “Notes of the ShSS” along with the research materials. As it was mentioned at the beginning of our research, Korduba’s debut as a reviewer took place precisely in the columns of the Shevchenko Society periodical. And in this case, it should be noted that the leading role of M. Hrushevskiy as a scientific guardian of the Galician scholar, who encouraged the student to cooperate with the bibliographic department “Notes of the ShSS” with the historiographical and financial arguments. Lviv Professor appreciated M. Korduba’s hard work, his analytical mind and knowledge of many languages, which made it possible to review a wide range of works. It could be explained by the fact that in the correspondence of a teacher and a student before the beginning of World War I, the process of preparing reviews is given almost the most space. For example, here is an excerpt from M. Hrushevskiy’s letter dated on November 17 of 1895, entirely devoted to the issue on filling the bibliographic department “Notes of the ShSS”: I would like to express gratitude for Evarnytskyi, and ask you to transfer or forward the mines to Lviv. Mykolayevich I will compare it for you. I am also asking you to review Filevych’s new article about the Carpathian Rus [...]. As for the periodical, based on experience, we had to make the following change: to review not for six months, but for a whole year, but for the more notable articles (for us) to give separate reviews, without waiting for the end of the year” (Kupchynskiy, 2016, p. 92).

On the initiative of M. Hrushevsky M. Korduba filled the bibliographic department of "Notes of the ShSS", and only during the Vienna period of his life he made more than forty critical reviews. Such fruitfulness was facilitated by the understanding of M. Korduba's importance for the contemporary Ukrainian historiography of the operational evaluation of novelties in the field of the East European studies. It is evidenced by his letter from Vienna to the teacher: "I will take up further work in the review department gladly, which only the Honorable Mr. Professor will determine, because I consider work for the common good to be the best goal of life" (Kupchynskiy, 2016, p. 93). We would like to note that reviews are a dominant component in the historian's creative output

Issues on reviews by M. Korduba on the pages of "Notes ShSS" impress with the extensive coverage of historical periods and raised issues, which once again testifies to the extraordinary erudition of the scholar. As expected, Ukrainian studies and Eastern European issues dominated the reviews. Thus, M. Korduba responded with reviews of the works of such contemporary authorities as E. Holubynskiy, N. Yorha, I. Filevych, K. Hroth, L. Kubalya, D. Yavornytskyi, A. Kraushar, V. Chermak, F. Vovk, R. Kaindl etc. Along with this, we see many critical reviews on the works of contemporary classics of the European historiography by J. Burchardt, K. Lamprecht, H. Heisenberg, O. Redlich, K. Kepler, and the others. Along with reviewing individual historical works, M. Korduba, at the request of the editor-in-chief of "Notes of the ShSS", was also a regular reviewer of such leading Western European Slavic magazines as "Zeitschrift für österreichische Volkskunde", "Ethnologische Mitteilungen aus Ungarn", "Zeitschrift für österreichische Geschichte", "Jahrbuch des Bukowiner Landes-Museums" and the others. It was from these reviews and reviews that the Ukrainian reader often learned about the novelties of the European scientific movement for the first time.

But the largest scale was marked by those carried out by M. Korduba published the annual bibliographic "Reviews of Western European literature on cultural and political history, the history of literature and fiction" since his student days. And in this case, the initiator and advisor was the editor-in-chief of "Notes ShSS". In many letters to the student, he raises the issue of preparation of the "Review", its structure and content. After the appearance of the first issues, M. Hrushevskyi wrote to his student with satisfaction: "[...] I really see that the technique of his ["Review"] is being developed by you, and when you will continue to work on it in the direction that I indicated to you in the previous letter, then it will be a really valuable part of "Notes"" (Kupchynskiy, 2016, p. 152). And indeed, from the very first editions, "Ohliady" ("Reviews") played an important place in "Notes of the ShSS".

In these reviews, M. Korduba, fluent in many languages, with characteristic criticism and erudition referred to numerous works of the German, the English, the French, the Italian, the Hungarian and the Russian researchers. The scale of the scholar's work is testified eloquently by the volume of the "Scientific Chronicle" section, which he maintains. Thus, only in 1898 it amounted to almost 100 pages. Such considerable dimensions required an internal grouping of the material, and M. Korduba conducts it according to chronological, problem thematic or disciplinary criteria. For example, the "Scientific Chronicle" in 1899 provided content headings for both disciplinary ("Historyosophy, Auxiliary Sciences of History, General Publications") and chronological ("Ancient Times (until 475 AD): 1. Egypt and the Ancient East 2. Greece; 3. Medieval times: 1. Travels of the Carolingians; 2. Medieval states (Korduba, 1898).

Due to the work in the critical bibliographic department "Notes of the ShSS" of M. Korduba formed his review style. Studying many of his critical materials allows us to conclude that the scholar was characterized by a thorough and comprehensive discussion of the reviewed work,

primarily focused on clarifying its advantages and disadvantages. Despite his young age, M. Korduba boldly, and sometimes defiantly, debates with his authoritative contemporaries. This appears to be an instance of his mastery of his tutor M. Hrushevskyy's methodological philosophy, which stressed that "Science is constant scepticism" (Telvak, 2002, pp. 125–141). For example, let's recall his review of the popular work of D. Yavornytskyi "History of the Zaporizhzhia Cossacks". M. Korduba, at the time a student at the University of Vienna, criticizes the narrative style of his famous colleague. In particular, he wrote: "The author limits himself to gathering facts, and this is far from the entire task of a historian. And the very way of telling a story in the form of a memoir is completely inappropriate in this case" (Korduba, 1895b, p. 41). The reviewer also does not like the architectonics of the discussed work, in particular, the abuse of D. Yavornytskyi by extensive citation of the documents. M. Korduba stressed out ironically the following: "This was in fashion in the last century, but now it is impossible. – Due to such an interpretation, the author becomes boring – what can be said in several tapes, stretches over several pages" (Korduba, 1895b, p. 42).

But the most important thing was that the reviewer in his evaluations of the studies on colleagues, especially Western ones, always started from the position of the Ukrainian historical interest. He consistently defended the historical subjectivity of our people, like a teacher, as well as the originality of its spiritual and material culture. Most often, we can notice this in M. Korduba's reviews on the works of the Polish and the Russian authors, who inertially spread imperial historiographical narratives. For example, let's recall the review of A. Kraushar's studio "Kartki historyczne i literackie". The Ukrainian historian threw inappropriate emotions at his Polish colleague when interpreting the sources of the period of the Polish-Ukrainian conflict: "In the end, we would like to point out to the author that when he tried to explain these documents against the background of contemporary events, he should have used a cold mind rather than a fantasy. Calling Khmelnytskyi's movement "the scenes of the wildest animal passions" already gone out of fashion, especially in research that claims to be scientific (Korduba, 1895a, p. 39).

Taking into account M. Korduba's thoroughness, diligence and thoughtfulness, he became M. Hrushevskyy as the most requested reviewer. The editor of "Notes of the ShSS" often paid him considerable advances for the future critical reviews, appreciating his regular reviewer and trying to support the unselfish student financially. However, when it came to the student's career prospects, M. Hrushevskyy subordinated the interests of the edited magazine to them. When M. Korduba finalized the process of obtaining a doctorate, M. Hrushevskyy released the student from his duties in the bibliographic department of "Notes of the ShSS" for this period: "Now you have to study up till a doctorate, so I will not give you any instructions regarding the review; put an end to it first" (Kupchynskiy, 2016, p. 134).

In the end, M. Korduba cooperated actively with the department of scientific chronicle "Notes of the ShSS" actively. Being himself extremely active in the historiographical movement of his time, the scholar understood the importance of informing promptly his colleagues about the main events of the scientific life. Therefore, he often shared with the readers of "Notes of the ShSS" his impressions of the academic forums in which he had to participate.

Due to M. Korduba's active cooperation with the Shevchenko Scientific Society and "Notes", a talented scholar was elected as a valid member of this uncrowned West Ukrainian Academy of Sciences. It happened on the recommendation of the Chairman of the Society, M. Hrushevskyy in July of 1903, which was a great honour for all students of Lviv Historical

School. Here, it would be appropriate to cite O. Pikh's quite valid observation, "that cooperation with the National Technical University in Lviv not only expanded the scientific opportunities, contributed to intellectual education, the popularization of M. Korduba's scientific ideas and researches, but also influenced the formation of his worldview" (Pikh, 2012, p. 16).

Finally, something should be said about the reception of M. Korduba's historiographic works on the pages of the Shevchenko Society's media tribune. It should be noted that contemporaries turned to the Galician scholar's studies with a considerable interest, as evidenced by the consistently favourable reviews of his articles published in "Notes of the ShSS". For example, we should recall the scientific discussion of intelligence "Between Zamost and Zboriv: the page of Semyhorod's relations with Ukraine and Poland". The Ukrainian reviewer M. Tkachenko on the pages of the Kyiv-based "Ukraine" indicated that "the article provides new interesting material for the history of diplomatic relations during the time of Bohdan Khmelnytskyi, which have not been fully covered yet" (Tkachenko, 1924, p. 162). Completely agreed with M. Tkachenko and his Polish colleague M. Gawlik, emphasizing in the columns of the periodical "Kwartalnik Historyczny" that "the author's work is an important reason that illustrates Khmelnytskyi's political combinations in relation to Poland and neighbouring states" (Gawlik, 1924, p. 380). The fact that works written by M. Korduba were often published separately at the expense of the Society as socially important texts for further wide distribution among the Galician community also speaks of his popularity in the "Notes of the ShSS".

The Conclusions. In conclusion, M. Korduba developed as a researcher and reviewer in a real creative laboratory "Notes of the Shevchenko Scientific Society". The scholar developed a critical style of historical thinking, mastered modern practices of source research, and mastered the theoretical and methodological tools of the time due to a professional advice given by Mykhailo Hrushevskyi, a teacher and editor-in-chief of the journal as well as his own hard work and determination. Thus, he became one of the most popular authors of "Notes of the ShSS", as evidenced by a favourable professional reception and mass reprinting of many articles in the form of brochures. In general, M. Korduba's multi-genre posts on the pages of "Notes of the ShSS" are an important part of the magazine's intellectual heritage, which will continue to be relevant at many points in the future. Taking this legacy into account is an important task of modern historiography. Hence, he became one of the most popular authors of "Notes of the Shevchenko Scientific Society", as evidenced by the favorable professional reception and mass reprinting of many articles in the form of brochures. In general, the multi-genre posts of M. Korduba on the pages of "Notes of the Shevchenko Scientific Society" are an important part of the magazine's intellectual heritage, which in many cases continues to be relevant. It is an important task of modern historiography to take this legacy into account.

Acknowledgments. The authors would like to express sincere gratitude to all members of the editorial board for consultations provided during the preparation of the article for printing.

Funding. The authors did not receive any financial assistance for the research and publication of this scientific work.

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The article was received April 17, 2024.

Article recommended for publishing 29/11/2024.

UDC 338.48(437)“1918/1938”
DOI 10.24919/2519-058X.33.317470

Roman KORSAK

PhD hab. (History), Professor, Head of the Department of Tourism Infrastructure and Hotel and Restaurant Industry, Uzhhorod National University, 19 Ukrainian Street, Uzhhorod, Ukraine, postal code 88000 (korsakr@i.ua)

ORCID: 0000-0001-9245-252X
ResearcherID: B-9061-2019

Tetiana HUSHTAN

PhD hab. (Economy), Associate Professor, Professor of the Department of Technology and Organization of the Restaurant Industry, Uzhhorod Trade and Economic Institute, State University of Trade and Economics, 21 Pravoslavna naberezhna, Uzhhorod, Ukraine, postal code 88000 (hushtantetiana@gmail.com)

ORCID:0000-0002-0299-0437
Research ID: JOK-5895-2023

Роман КОРСАК

доктор історичних наук, професор, завідувач кафедри туристичної інфраструктури та готельно-ресторанного господарства, ДВНЗ “Ужгородський національний університет”, вул. Українська, 19, м. Ужгород, Україна, індекс 88000 (korsakr@i.ua)

Тетяна ГУШТАН

докторка економічних наук, доцентка, професорка кафедри технології і організації ресторанного господарства, Ужгородський торговельно-економічний інститут Державного торговельно-економічного університету, Православна набережна, 21, м. Ужгород, Україна, індекс 88000 (hushtantetiana@gmail.com)

Bibliographic Description of the Article: Korsak, R., & Hushtan, T. (2024). Development of the hotel and tourist complex in the Moravian Karst during the Czechoslovak period (1918 – 1938). *Skhidnoievropeiskyi istorychnyi visnyk [East European Historical Bulletin]*, 33, 104–116. doi: 10.24919/2519-058X.33.317470

**DEVELOPMENT OF THE HOTEL AND TOURIST COMPLEX
IN THE MORAVIAN KARST DURING THE CZECHOSLOVAK PERIOD (1918 – 1938)**

Abstract. The Purpose. In the article, the authors considered the development of the hotel and tourist complex and hospitality infrastructure in the Moravian Karst during the Czechoslovak period, which at that time was represented by hotels, tourist hostels, private guest houses and restaurants. Also, the authors of the study analysed the influence of the construction of the hospitality infrastructure of the Moravian Karst on the development of the all-Czechoslovak tourist movement in 1918 – 1938, determined the historical conditions and factors that influenced the development of the hotel-tourist complex during this period. **The Research Methodology.** During the scientific research on the development of the hotel and tourist complex in the Moravian Karst during the Czechoslovak period (1918 – 1938), the authors of the publication applied the following general scientific methods, in

particular: analysis, synthesis, systematicity, generalization, historicism. It should be noted that during the research, the authors preferred historical methods: historical descriptive method (historical genetic, historical comparative, historical synthetic), historical diachronic, empirical analysis method. Literary sources, architectural plans, investment documents, tourist advertising materials, statistical data on attendance, profitability and other economic indicators of the hotel-tourist complex of the Moravian Karst were analysed with the help of the mentioned methods. **The Scientific Novelty.** The research opens up an opportunity to fill historical gaps related to the development of tourism and the hotel tourist complex in the region of the Moravian Karst during the period between 1918 and 1938. The specified period is key to understanding tourism and economic transformations after World War I in Czechoslovakia. Also, for the first time in the Ukrainian historiography, the article focuses on the analysis of hospitality and tourism infrastructure formation process in the Moravian Karst during the interwar period. **The Conclusions.** It has been proven that the period between 1918 and 1938 was important for tourism in the Moravian Karst region. Since Czechoslovakia gained independence after the war, the specified period was marked by the transformation of the hotel and tourist complex under the influence of new socio-cultural and political realities. At that time, there was an expansion of the tourist infrastructure, in particular, an increase in the number of hotels and restaurants. This shows the growing interest in the region as a tourist centre. Also, the development of the hotel and tourist complex was connected with the popularity of objects such as the Macocha abyss and the Punkevní caves – which attracted tourists and contributed to the development of the hospitality infrastructure of the Moravian Karst. Finally, the authors proved that tourism in the Moravian Karst turned out to be an important factor for the local economy, especially in the context of supporting the hotel and tourist business and attracting investments.

Key words: hotel-tourist complex, hospitality infrastructure, Moravian Karst, Punkevní caves, Macocha abyss, Baltsarka cave, Kateryzhynska cave, Slopsko-Shoshuv caves, Úpustek cave, hospitality, tourism, hotel establishments.

РОЗВИТОК ГОТЕЛЬНО-ТУРИСТИЧНОГО КОМПЛЕКСУ НА МОРАВСЬКОМУ КАРСТІ У ЧЕХОСЛОВАЦЬКИЙ ПЕРІОД (1918 – 1938)

Анотація. Мета. У статті авторами розглянуто розвиток готельно-туристичного комплексу та інфраструктури гостинності на Моравському карсті у чехословацький період, яка була представлена на той час готелями, туристичними гуртожитками, приватними гостинними дворами та ресторанами. Також автори дослідження проаналізували вплив розбудови інфраструктури гостинності Моравського карсту на розвиток загально-чехословацького туристичного руху протягом 1918 – 1938 рр., визначили історичні умови і фактори, що вплинули на розвиток готельно-туристичного комплексу у цьому періоді. **Методологія дослідження.** Під час здійснення наукового дослідження щодо розвитку готельно-туристичного комплексу на Моравському карсті у чехословацький період (1918 – 1938), автори публікації застосували такі загальнонаукові методи, зокрема: аналізу, синтезу, системності, узагальнення, історизму. Відзначимо, що під час здійснення дослідження автори віддали перевагу історичним методам: історико-описовому (історико-генетичному, історико-порівняльному, історико-синтетичному), історико-діахронному, методу емпіричному аналізу. За допомогою зазначених методів було проаналізовано літературні джерела, архітектурні плани, документи щодо інвестицій, туристичних рекламних матеріалів, статистичні дані щодо відвідуваності, прибутковості та інших економічних показників готельно-туристичного комплексу Моравського карсту. **Наукова новизна.** Дослідження відкриває можливість заповнити історичні прогалини, які пов'язані з розвитком туризму та готельно-туристичного комплексу в регіоні Моравського карсту протягом періоду між 1918 і 1938 рр. Зазначений період є ключовим для розуміння туристичних та економічних трансформацій після Першої світової війни у Чехословаччині. Також у статті вперше в українській історіографії розглянуто процес розбудови інфраструктури гостинності та туризму на Моравському карсті у міжвоєнний період. **Висновки.** Доведено, що період між 1918 і 1938 рр. був важливим для туризму в регіоні Моравського карсту. Оскільки Чехословаччина здобула незалежність після війни, зазначений період відзначався трансформацією готельно-туристичного комплексу під впливом нових соціокультурних та політичних реалій. У цей час

спостерігалось розширення туристичної інфраструктури, зокрема збільшувалася кількість готелів і ресторанів. Це свідчить про зростання інтересу до регіону як туристичного центру. Також розвиток готельно-туристичного комплексу був пов'язаний з популярністю об'єктів, таких як прітва Мацоха (Masocha) і Пункевні печери (Punkevní jeskyně), які приваблювали туристів та сприяли розвитку інфраструктури гостинності Моравського карсту. Насамкінець авторами доведено, що туризм на Моравському карсті виявився важливим фактором для місцевої економіки, особливо в контексті підтримки готельно-туристичного бізнесу і залучення інвестицій.

Ключові слова: готельно-туристичний комплекс, інфраструктура гостинності, Моравський карст, Пункевні печери, прітва Мацоха, печера Бальцарка, Катержинська печера, Слоупсько-шошувські печери, Печера Випустек, гостинність, туризм, готельні заклади.

The Problem Statement. The article focuses on the historical analysis of the hotel and tourist complex development in the Moravian Karst during the Czechoslovak period (1918 – 1938). The chronological framework of the study (1918 – 1938) was chosen for the scientific analysis of the development of the hotel and tourist complex in the Moravian Karst due to important political and social changes that occurred in Czechoslovakia after World War I. In 1918, the declaration of independence of Czechoslovakia was a turning point for the development of hospitality infrastructure, industry and tourism. The newly formed state needed economic development and stability, which included supporting tourist attractions such as the Moravian Karst. Tourism became an important part of the region's development strategy, as it contributed to attracting foreign currency and creating jobs.

The period of 1918 – 1938 is characterized by a significant modernization of the tourist infrastructure in the Moravian Karst, including the discovery of caves, the development of transport routes, and the growth of the hotel business. Owing to the support from the state and private entrepreneurs, in the Moravian Karst tourism became popular among tourists both from Czechoslovakia and abroad.

The upper chronological limit (1938) is due to political events, in particular the Munich Agreement, which changed the situation in Czechoslovakia radically. After the annexation of the Sudetenland and the start of World War II, economic and political instability led to the decline of tourism industry. In Europe growing tensions and conflicts negatively affected tourist flows and opportunities for further development of infrastructure, in particular hotel and tourist facilities. Many of the efforts that were aimed at developing the hotel and tourist complex in the 1920s and 1930s came to naught due to political upheavals, making the year of 1938 a logical conclusion of this period.

In our opinion, the study of hotel and tourist complex development of the specified region in a historical context is important from several points of view:

- studying the history of development of hotel and tourism sectors in the Moravian Karst allows us to understand how they influenced the economy of the newly formed Czechoslovakia during the interwar period;
- development of hotel and tourist infrastructure makes it possible to understand how these economic sectors influenced cultural aspects of the region, including preservation and promotion of historical sites of Moravia, traditions, cultural diversity, and interaction among different cultural communities of Czechoslovakia;
- analysis of the history of hotel and tourist infrastructure development provides an opportunity to study changes in the architectural landscape and urbanization of the region. This includes the analysis of changes in local planning, infrastructure development and impact on the urban environment;

– historical research allows us to determine how the development of hotel and tourist complex affected ecosystems, recreation areas, and other natural objects of the Moravian Karst;

– the study of historical experience is also relevant for Ukraine, since its territory has a significant number of natural objects that are intensively used in tourism and hospitality today.

Thus, understanding the history of hotel and tourist complex development in the Moravian Karst in 1918 – 1938 can serve as important information for making decisions regarding further development of tourism and hospitality, ensuring sustainable use of resources and preservation of cultural heritage, both in the modern Czech Republic and in Ukraine, which today has received the status of candidate for EU membership (Hushtan & Korsak, 2024, pp. 78–84).

The Review of Recent Research and Publications. The review of recent publications shows that there are no domestic studies on the development of hotel and tourist complex in the Moravian Karst during the Czechoslovak period (1918 – 1938). Among few publications related to the study of Czechoslovak tourism, the studies by Transcarpathian scholars should be highlighted. The specified researches focus on the historical process of forming tourist attractiveness of the Transcarpathian region (Korsak, 2017), the development of tourism in Transcarpathia in 1918 – 1938 (Hoca, 2017), tourism development trends in Subcarpathian Rus' (Furtiy, 2017), analysis of the tourism potential of Bohemia during the First Republic (Furtiy, 2020), research into the historical “phenomenon” of the Czechoslovak hospitality and tourism (Korsak & Hodia, 2023), as well as the current development of the Czech Republic tourism industry in the context of cooperation with Ukraine (Korsak, Ilnytskyi & Hodia, 2018; Korsak, Ilnytskyi & Sichka, 2019). We believe that the trend of studying Czechoslovak tourism during the period of 1918 – 1938 by Transcarpathian scholars is due to the historical past of Transcarpathia as part of the Czechoslovak Republic. Taking into consideration the above mentioned, the basis of the research is the Czech sources.

The Purpose of the Article: to do a comprehensive research on the process of development of the hotel and tourist complex in the Moravian Karst during the Czechoslovak period (1918 – 1938). To achieve the goal, the authors singled out the following main **objectives**:

– to analyse the historical prerequisites and principles of the development of the hotel and tourist infrastructure of the specified region;

– to do the research on the interaction between the hospitality sector and tourism in the Moravian Karst during the Czechoslovak period, as the development of hotel and tourism infrastructure influenced the economic development of Moravia and the country as a whole;

– to analyse scientific sources on this issue;

– to draw well-founded conclusions regarding the conducted scientific research.

The Results of the Research. The Moravian Karst is a karst region in the Czech Republic, in the southeastern part of the country (a historical name – Moravia). This is one of the largest karst massifs in Europe, 25 km long and 2–6 km wide. Today, the Moravian Karst is a popular Czech tourist attraction and landmark, formed by about 1,100 caves, of which five are open to tourists: Punkevní Caves (Punkevní jeskyně), a system of caves through which, along an underground river, the path to the bottom of the Macocha Abyss runs, Balcarka Cave (Jeskyně Balcarka), which is rich in stalactites, Kateřinská jeskyně, rich in stalagmites Sloupsko-šošůvské jeskyně with underground chasms and huge tunnels and caves, Výпустek Cave (Jeskyně Výпустek), which is formed mainly from fossils. Therefore, the development of hotel and tourist infrastructure in the region over the past hundred years is associated with the popularity of the tourism and interest in the above mentioned natural objects.

The first official mention of the natural monument dates back to 1575, and the oldest written account of Výпустek Cave dates back to 1608, located in the central part of the Moravian Karst (Musil, 2010, pp. 9–19; Štelcl, 1985, pp. 38–39; Absolon, 1970, pp. 25–29).

It should be noted that organized tourism in the Moravian Karst emerged in the second half of the 19th century, when nature trips became part of general education and were therefore promoted by teachers, doctors, and among the Moravian intelligentsia. Travellers and tourists visited this region for outdoor activities, cave exploration, mountaineering, and other adventure recreation. Therefore, it is natural that over the years, and especially in the interwar years, the hotel and tourist infrastructure in the Moravian Karst increased for the convenience of travellers, including: hotels, restaurants and other service facilities (Absolon, 1912, p. 191).

In 1918 – 1938, the development of hotel and tourist infrastructure in the Moravian Karst was determined by numerous historical, cultural and natural factors, among which we should highlight the following ones:

1. The uniqueness of the natural landscape. This is due to the fact that the Moravian Karst is famous for its karst formations, huge caves and gorges, and this, in turn, made it attractive for local history tourism among different segments of the Czechoslovak population;

2. The Moravian Karst region during the Czechoslovak period drew tourists' interest and intensified scientific archaeological research that could point at the ancient history of humanity in this region. In particular, some of the archaeological sites in the Moravian Karst include the Hallstatt burials in the cave Býčí skála, Early Stone Age human settlements, bone, stone and iron objects, as well as many Pleistocene animal bones in the Balcarka Cave (Jeskyň Balcarka).

3. Cultural events, historical monuments of the region, and travel traditions also became an attractive factor for the development of a hotel and tourist complex in the Moravian Karst.

After the end of World War I and the founding of the Czechoslovak Republic, the question arose about the exploitation of the caves in the following years (Břoušek, 2005, p. 45; Kolář, 2003, pp. 97–98).

An active tourist activity of the former Club of Czech tourists (Klub českých turistů), which was renamed after 1918 into the Czechoslovak Tourists Club, contributed to the growth of the number of visitors to the Moravian Karst. At this time, shortcomings were identified in the provision of services to tourists – the lack of accommodation for travellers and the insufficient number of quality roads that would connect the Blansko station with attractive tourist destinations in the Moravian Karst. The Road “Pustý – žleb”, i.e. from Blansko to Sloup, was completed in 1920 (Balák, 1999, p. 93).

At this time, efforts to nationalize the Moravian Karst Cave also intensified. The nationalization was justified on the grounds that it was a matter of public interest, concerning the preservation of natural beauty and generation of income from tourism. At the time of the creation of the First Republic, the caves “Punkevní” and “Kateřinská” were under the management of the prince's Franz Salm cave companies, who was a representative of the Austrian-Moravian noble family of Salm-Reifferscheid-Krautheim, known for its possessions and family influence in Central Europe. Prince F. Salm played a significant role in the development of tourism in Moravia, in particular in the research and management of the caves of the Moravian Karst. At the time of the establishment of the First Czechoslovak Republic, his companies were engaged in the development and exploitation of caves, including the aforementioned Punkevní and Kateržynska Caves, headed by the technical director, a prominent Czech speleologist, archaeologist and scientist, Karel Absolon. The

latter was involved in the research and mapping of underground cave systems in the region. Owing to his work, the Moravian Karst became an important tourist and scientific location. In turn, part of the Macocha belonged to The Czech Tourist Club Klub českých turistů, the other one – to the Austrian Tourist Club (Rakouského turistického klubu) and the village of Wilemovice (Kolář, 2003, pp. 97–98; Absolon, 1932, pp. 25–34).

Prince F. Salm and Professor K. Absolon opposed the proposal to nationalize the caves. Thus, the bill on the nationalization of the Moravian Karst was removed from the agenda of government negotiations (Pakr, 1977, p. 22).

However, K. Absolon proposed establishing a special company that would transfer the right to manage the entire territory of the Moravian Karst, in which both existing landowners and representatives of state institutions would be represented. At the beginning of 1922, a preparatory committee was created to establish a new company – “Moravský kras – provoz a výzkum jeskyň”, which began operating in 1925. As a subject of economic activity, in its charter the company stated the following principles of its activities:

1. To exploit and use caves rationally;
2. To develop caves to increase tourist activity: installation of all types of communications, creation and operation of facilities for the accommodation and comfort of visitors to the Moravian Karst and other cave areas, such as hotels, boarding houses, restaurants, cafes, hostels, canteens, etc.;
3. Organization of all types of entertainment and sports events, organization of national folk festivals, etc.;
4. To conduct systematic scientific research to further explore the underground cave labyrinth of the Moravian Karst;
5. Advertising and popularization of the Moravian Karst in the country and abroad (Absolon, 1970, pp. 119–128; Kolář, 2003, pp. 97–98).

It should be noted that during the existence of the company's preparatory committee, attendance and, at the same time, income from the exploitation of the caves increased. In particular, the number of visitors to the caves of the Moravian Karst in 1922 was 216,047 people. Thus, the company set goals for the next period to expand rail and bus connections, as well as the organization of hotel services in the area (Balák, 2003, pp. 146–147).

Punkevní jeskyně was in first place in terms of the number of visitors among the caves of the Moravian Karst. In the 1920s, the cave's popularity among tourists increased owing to a visit by the President of the Czechoslovak Republic Tomáš Garrigue Masaryk, who visited it on September 17, 1921 (the dome of the cave was named in his honour) (Štelcl, 1985, p. 46; Boček, 1928, p. 100; Balák, 2003, pp. 165–169).

At the entrance to the cave, a pier was set up for boats that sailed with visitors through the water domes to the Masaryk Cave. Each of the four boats had twelve seats for visitors and one or two rowers. The Masaryk Dome was considered the most beautiful cave in Europe (Absolon, 1932, pp. 90–94).

It should be noted that seasonality played an important role in the number of tourists visiting the caves of the Moravian Karst. In particular, adverse weather in the form of heavy rains led to an increase in the water level in Punkevní cave. In 1929 the problem was solved by building an artificial tunnel to lower the water level. At the beginning of the 1930s the decline in cave attendance can also be explained by the outbreak of the World Economic Crisis. In 1927, the cave was visited by 103,423 people, and in 1928, a record number of tourists visited the cave – 210,567 people, and in 1929 – 88,687 people. In 1930 after the

completion of renovation work in the cave, this figure increased slightly compared to the previous year and amounted to 109,088 people. In the following years, there was a tendency to reduce the number of tourists: In 1931 – 88,665 people, and in 1932 – 82,545 people, which was the lowest figure in the last 5 years. The above-mentioned structure of the cave's attendance during the period under analysis is shown in Figure 1 (Pakr, 1977, pp. 22–23. Pakr, 1979, pp. 137–138; Štelcl, 1979, p. 92).

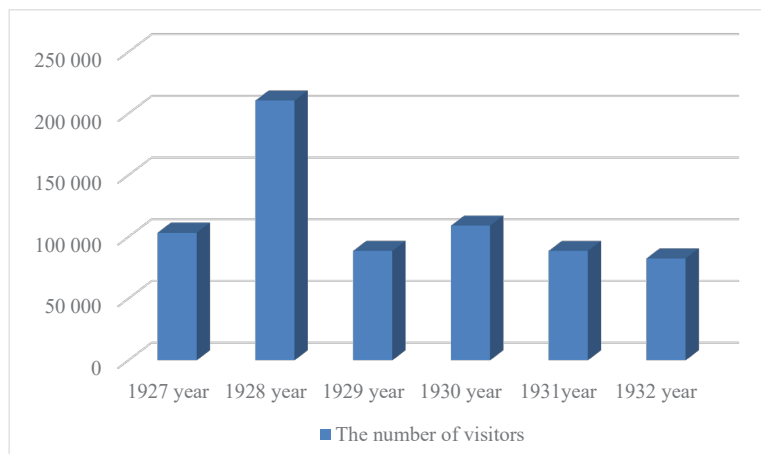


Fig. 1. State of attendance of Punkevní Cave in 1927 – 1932

To increase the number of visitors to the Sloupsko-šošůvská Caves (jeskyní) whose attendance decreased after the opening of the Macocha Abyss for inspection and popularization of the Punkevní Cave (Punkevní jeskyně) the company “Ostrovské společnost” purchased a sightseeing bus, which in May of 1926 began providing sightseeing tours from the water mill in Blansko – “Skalního mlýna” (Skalního mlýna, 1353 p.) to all accessible caves and to the tourist shelter KČST in the Macocha Abyss. Thus, as of 1926, two bus lines operated – a regular one between Blansko and Sloup and an irregular one between Blansko and Macocha, which served tourists. The following year, the Moravian Karst company handed over the excursion bus to the State Road Transport Administration so that transport to the caves could be evenly organized according to the transportation schedule (Polák, 1995, p. 71).

In 1922, the Moravian Karst company began considering the construction of a large hotel (Nečas, 1988, p. 11). In particular, it was decided that the hotel would be created by expanding the original inn in Skalní mlýn, and thus it would become the starting point of the excursion route to visit the Punkevní and Kateřinska Caves. The reconstruction of the existing inn and the addition of other buildings began in 1928 and was completed in March of 1929 (Balák, 2003, p. 114).

In the hotel there were eighteen rooms with sixty beds and there were also hostels for 300 people. Near the hotel there was a shop with postcards, guidebooks, souvenirs, as well as an information service, garages and a gas station. There was a bus line next to the hotel. The above mentioned services are depicted on the back cover of the 1932 guide by K. Absolon (Absolon, 1932, p. 128). In turn, catering services were provided at the Skalní Mlýn tavern (Balák, 2003, pp. 116–117).

The promotion of tourism and hospitality in the region took place through cultural and festive events. In particular, the most significant was “Exhibition of contemporary culture in Brně” (Výstavy soudobé kultury v Brně), which took place from May to October 1928. The exhibition recommended visiting the Moravian Karst, which, among other things, attracted attention with the paintings of the Punkevní Caves, which were included in the pavilion “Člověk a jeho rod”. Mainly due to the exhibition, the number of visitors to the caves increased significantly in 1928, which was almost twice as much as the previous year (1927 – 190,055 people, 1928 – 352,827 people) (Pakr, 1979, p. 138).

After access to other parts of the Punkevní Caves was gained, a circular bus route was put into operation in 1926 by the Moravian Karst joint-stock company, between Rajec and Sloup. Visitors to the specified route were able to choose several excursion options, ending with a return to the hotel Břoušek. The generally accepted route for the excursion was from the entrance to the cave and back to the specified hotel. The route was accompanied by guides who took visitors through the caves and gave them explanations about the cave labyrinth. The entire tour route was about three kilometers long and the guided tour lasted about ninety minutes (Boček, 1928, p. 152).

In particular, the tour was conducted through a cave labyrinth Sloupsko-Šoszów Caves, which were characterized by long corridors without stalactites. The most attractive parts of the Sloupsko-Šoszów caves for visitors were the cave Eliščinajeskyně with rich decoration of stalactites. The culmination of the excursion was the Black Abyss (Absolon, 1932, pp. 14–15; Boček, 1928, pp. 156–174).

The Sloupsko-šoňvská caves visited by an average of about 15,000 people per year. Analysis of information on the attendance of the above-mentioned caves in the 1920s and early 1930s shows that attendance fluctuated significantly, especially during the years of the Great Depression: 1927 – 17,227 people, 1928 – 28,319 people, 1929 – 16,143 people, 1930 – 24,293 people, 1931 – 13,750 people, 1932 – 10,205 people, which is also graphically reflected in Figure 2 (Pakr, 1977, pp. 22–23; Štelcl, 1979, p. 92).

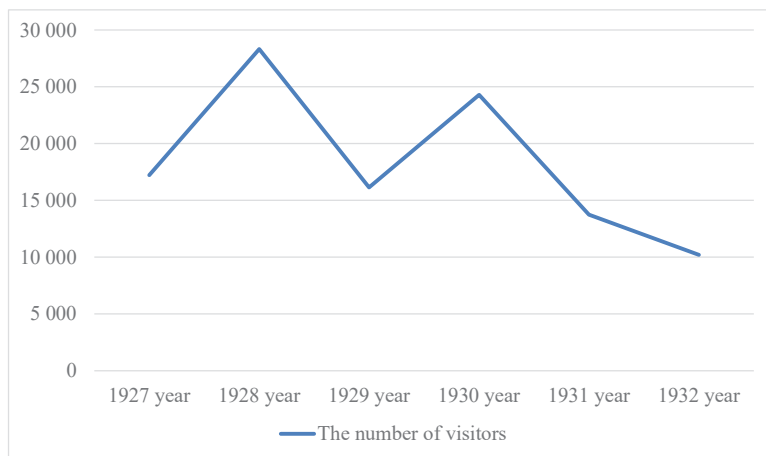


Fig. 2. Attendance at the Sloupsko-Šoszów Cave in 1927 – 1932

A guest cottage nearby was popular with tourists of the Sloupsko-Šoszów Cave – the aforementioned hotel of the same name owned by entrepreneur Josef Břoušek, which was

located directly at the entrance to the caves. However, the hotel's capacity was not enough for all the tourists. Therefore, in 1926 Josef Břoušek decided to build an additional hostel that provided overnight accommodation during excursions (Pakr, 1977, pp. 22–23; Pakr, 1979, pp. 136–138).

It should be noted that in 1928 the caves were visited by the largest number of tourists (28,319 people), and accordingly the hotel, which was also due to the already mentioned exhibition in Brně. As a result of increasing profits from local tourism, J. Břzoušek's son built a much larger hotel in 1935, which was considered one of the best hotels in the Moravian Karst (Břzoušek, 2005, pp. 28–30).

In addition to the above mentioned hotel in Sloup, you could use the services of a tavern in the Skotak guest house in Sloup or in the Mikulasheka guest house in Shoshovka near the caves (Boček, 1928, p. 326).

The second most visited cave in the Moravian Karst was Kateřinská cave. The cave and the entire tour route were illuminated by electric lamps from the Moravian Karst joint-stock company. The tour of the cave lasted about half an hour. The ticket to the Kateřinská Cave was the cheapest for tourists from the publicly accessible caves in the northern part of the Moravian Karst – 1.5 Kč in 1930. For comparison, a ticket to the Macocha Abyss and the Sloupsko-Šošzów Caves cost as of 1930 – 23 Kč (Absolon, 1932, p. 128). The cave was visited by an average of over 40,000 visitors per year (Absolon, 1932, p. 110.; Pakr, 1977, pp. 22–23.; Pakr, 1979, pp. 137–138). Statistical data for the period under analysis are given in Table 1.

Table 1

Attendance status Kateřinská Cave in 1927 – 1932

№	Year	Number of visitors (people)
1.	1927	44 630
2.	1928	81 068
3.	1929	34 664
4.	1930	42 313
5.	1931	33 020
6.	1932	35 297

For tourists, it was appropriate to use the bus line, which was introduced in 1926 by the joint-stock company “Moravian Karst”. The line ran from the inn Skalní mlýn to the Kateřinská Cave, then to the tourist shelter near the Macocha abyss (Absolon, 1932, p. 9).

Regarding the hotel and tourist infrastructure, we note that in addition to the hotel “Břzoušek”, hotel “Skalní Mlýn”, at the beginning of the 1920s, a single tourist cottage operated near the Macocha Abyss, which burned down during a fire on December 15, 1927. Immediately after the fire, in February of 1928, the Czechoslovak Tourists Club (KČST) developed sketches for the construction of a new cottage. The new lodge was designed so that its restaurants and accommodations would accommodate the larger number of visitors who came to the Macocha Abyss. In November of 1928, the tourist cottage was inaugurated, as the so-called “Jubilejní chata”. In the the building there were eight rooms with a total of 15 beds, two hostels for 50 people, a large dining room with an area of over 110 m², behind which there was a closed porch with an area of 24 m². Construction costs reached over half a million Czechoslovak crowns (Nečas, 1988, p. 14; Štelcl, 2011, pp. 76–77).

Thus, “Jubilejní chata”, near the Macocha abyss, hotel “Břzoušek” near Sloupě, hotel “Skalní Mlýn”, as well as other inns and guest houses in particular, Skotákova hostince ve Sloupě and Mikulášková hostince v Šošůvce (Mikulášková hostince v Šošůvce) were built due to the development of tourism in the Moravian Karst.

The caves which were available for tourists were located in the central and southern parts of the Moravian Karst. Those were the caves: Býčí skále cave, Výпустek cave, Mariánské cave (Štancl, 1994, p. 18). However, due to renovation and mining work, these caves were visited by fewer tourists than the rest of the Moravian Karst caves. In particular, in 1928, when the attendance for the northern caves of the Moravian Karst was a record – 350,557 people, for the caves of the central and southern karst – 2,270 people (Pakr, 1979, p. 137).

For the hundreds of thousands of visitors who had been passing through the caves of the Moravian Karst every year since the 1920s, it was necessary to expand the offer of services and, above all, to increase catering and accommodation options in the Moravian Karst. The opportunity to meet the needs of such a large number of tourists concerned the town of Blansko, which, due to its location, became the starting point for trips to the Macocha Abyss and publicly accessible caves. Therefore, a large hotel was built there later. It is necessary to emphasize the importance of the local branch of the Czechoslovak Tourist Club (KČST) for the development of the hotel and tourist infrastructure in the city. The KČST branch in Blansko compensated for the lack of beds in local guesthouses and hotels by building tourist hostels. The hostels operated in different locations during different periods of time. At the end of the 1920s, the club organized several dormitories in Blansko, including the “Workers’ House”, in the local sanatorium, and the castle. In total, there were almost 250 beds. The fact that hostels were used relatively widely is evidenced by the number of overnight stays in 1921 – 2,336 people. In addition to hostels, the local authorities in Blansko and its surroundings also sponsored the operation of the so-called summer apartments, which were offered to those wishing to stay for a long time. In addition to arranging and maintaining dormitories, the KČST department in Blansko took care of the shelter, and later the “Jubilee Cottage” in Macocha, in which there was also the dormitory (Čech, 1905, p. 38.; Pilnáček, 1927, p. 328).

At the beginning of the 1930s, the economic crisis affected the development of tourism in the Moravian Karst significantly. At that time, the demand for accommodation and catering services decreased, so some local restaurateurs and hoteliers asked their landlords to reduce rents, as their incomes had decreased as a result of the crisis significantly. Taking the above mentioned into consideration, it is clear that the number of visitors to the Moravian Karst decreased significantly (Brychtová, 1978, p. 2).

Since 1933, the Moravian Karst Joint Stock Company had faced financial difficulties due to the Great Depression of the 1930s, as well as the lack of significant investments in making the caves of the Moravian Karst more accessible. This led to the liquidation of the company in 1939. However, it should be noted that it existed until 1945 under the name “Joint Stock Company of the Moravian Karst in Liquidation” (Akciová společnost Moravského krasu v likvidaci). Later, in 1951, the Regional Municipal Enterprise “Moravian Karst” was established in the town of Blansko (Balák, 1999, p. 93). In general, we should note that by 1939, approximately 4,400,000 tourists visited the beauty spots in the Moravian Karst before the start of World War II, including tourists from Czechoslovakia and various countries in Europe and the world (Pakr, 1979, p. 138).

The Conclusions. It should be concluded that the period from 1918 to 1938 was characterized by the growth of tourism in the Moravian Karst, the expansion of the hotel

and restaurant business, and the emergence of financial difficulties that required strategic management and the search for financial solutions. The hotel and tourist complex “Jubilejní chata”, near the Macocha Abyss, the hotel “Břzoušek” near Sloupě, hotel “Skalní Mlýn”, as well as other inns and guest houses in particular, “Skotákova hostince ve Sloupě” and “Mikulášková hostince v Šošůvce” were built due to the development of tourism and hospitality in the Moravian Karst during the Czechoslovak period.

Thus, the following comprehensive conclusions can be formulated regarding the development of the hotel and tourist complex in the Moravian Karst during the Czechoslovak period (1918 – 1938):

1. The period from 1918 to 1938 witnessed a significant expansion of access to caves in the Moravian Karst, which included the opening of new tourist routes and excursions and an increase in the number of caves available for tourists to visit.

2. During this period, the hotel and tourist infrastructure in the Moravian Karst developed actively. The construction of new hotels, restaurants and tourist cottages indicates a growing interest in the region and improved amenities for visitors.

3. The tourist organizations such as the “Club of Czechoslovak Tourists” (Klub československých turistů), played a key role in the study and preservation of the natural unique features of the Moravian Karst, in particular, cave formations and scenic sites, and also contributed to the development of a hotel and tourist complex in this region.

4. Economic problems, such as the high costs of maintaining the caves and the economic depression of the 1930s, led to financial difficulties in the Moravian Karst company (Moravský kras), which ultimately negatively affected the development of tourism and hospitality in the region.

5. The northern part of the Moravian Karst, in particular the Punkevní Caves and the Macocha Abyss, was identified as the main centre of tourist traffic, as evidenced by the high number of visitors to these sites.

6. Natural sites of the Moravian Karst, such as the “Býčí skála”, were distinguished not only by their tourist popularity, but also by their archaeological uniqueness, which gave them additional historical and cultural significance.

Prospects. Based on the research conducted on the development of the hotel and tourist complex in the Moravian Karst during the Czechoslovak period (1918 – 1938), several promising areas for further research should be singled out:

1. The economic aspect, which consists of a detailed analysis of economic factors that influenced the development of the hotel and tourist complex of the Moravian Karst, i.e. compiling cost-benefit reports, studying marketing strategies and profitability of tourist infrastructure facilities.

2. The socio-cultural dimension involves considering the impact of tourism on the local population and cultural heritage, in particular: studying the interaction of tourists with the community, the role of tourism and hospitality in the preservation and promotion of the cultural and natural values of the Moravian Karst.

3. The researches on infrastructure and architectural aspects, which consist in analyzing the development of hotel and transport infrastructure in the Moravian Karst, studying the architectural features of hotels and other tourist service facilities during the period of 1918 – 1938.

4. Dissemination of tourist routes and excursions, i.e. studying the dynamics and popularity of tourist routes, in particular, those mentioned in the context of the Moravian Karst, and their impact on the development of tourism and the hotel and restaurant business in the region.

5. Analysis of the impact of tourism on ecosystems and the health of natural sites and development of sustainable development strategies to ensure the balanced use of the resources of the Moravian Karst.

6. Studying the role of state and public institutions in the development of tourism, as well as identifying the impact of political events on the hotel and tourism sector of Czechoslovakia in 1918 – 1938.

7. Comparison of the development of tourism and hospitality in the Moravian Karst during the Czechoslovak period with the current state of development of the hotel and tourism business in the Czech and Slovak Republics, as well as the Transcarpathian region of Ukraine.

8. The possibility of practical application of the acquired experience for the development of tourist facilities of the Transcarpathian region during the period of future post-war reconstruction. This includes the identification of similar and different trends, taking into account new challenges and opportunities.

We believe that these aspects can help broaden the understanding of the development of the hotel and tourist complex in the Moravian Karst in 1918 – 1938 and provide a deeper analysis of the interaction of tourism, economy, and culture in the historical context of the study of Czechoslovakia.

Acknowledgements. We express sincere gratitude to all members of the editorial board for consultations provided during the preparation of the article for publishing.

Funding. The authors received no financial support for the research, authorship, and/or publication of this article.

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*The article was received April 09, 2024.
Article recommended for publishing 29/11/2024.*

UDC 94:321.01|(477)“1919”
DOI 10.24919/2519-058X.33.317467

Mariana KOMARYTSIA

PhD hab. (Philology), Senior Research Fellow, Head of the Department of the Research Institute for Press Studies, Vasyl Stefanyk National Scientific Library of Ukraine in Lviv, 2 Vasyl Stefanyk Street, Lviv, Ukraine, postal code 79000 (komar_mar@ukr.net)

ORCID: 0000-0003-2951-1237

Hanna KHLIBOVSKA

PhD (History), Associate Professor, Department of World History, Lesya Ukrainka Volyn National University, 13 Voli Avenue, Lutsk, Ukraine, postal code 43025 (h.khlibovska@ukr.net)

ORCID: 0000-0001-9764-3595

Мар'яна КОМАРИЦЯ

докторка філологічних наук, старша наукова співробітниця, завідувачка відділу Науково-дослідного інституту пресознавства, Львівська національна наукова бібліотека України імені В. Стефаника, вул. В. Стефаника, 2, м. Львів, Україна, індекс 79000 (komar_mar@ukr.net)

Ганна ХЛІБОВСЬКА

кандидатка історичних наук, доцентка кафедри всесвітньої історії, Волинський національний університет імені Лесі Українки, проспект Волі, 13, м. Луцьк, Україна, індекс 43025 (h.khlibovska@ukr.net)

Bibliographic Description of the Article: Komarytsia, M., & Khlibovska, H. (2024). Proclamation of the Ukrainian People's Republic and West Ukrainian People's Republic Unification Act: the press resonance in Halychyna. *Skhidnoievropeiskyi istorychnyi visnyk [East European Historical Bulletin]*, 33, 117–128. doi: 10.24919/2519-058X.33.317467

**PROCLAMATION OF THE UKRAINIAN PEOPLE'S REPUBLIC
AND WEST UKRAINIAN PEOPLE'S REPUBLIC UNIFICATION ACT:
THE PRESS RESONANCE IN HALYCHYNA**

Abstract. *The article focuses on the analysis of the Unification discourse in the Galician periodicals related to the Unification Act – the solemn proclamation of the Unification of the West Ukrainian People's Republic (ZUNR) with the Ukrainian People's Republic (UNR). The main thematic dominants have been highlighted with comparative parallels from the Trans-Dnieper publications, on the basis of the “press dialogue” consonant and debatable points have been outlined. **The object** of the study is the Galician editions “Narod”, “Republika”, “Republikanets”, “Nove Zhyttia” (all published in Stanislaviv), “Ukrayinsky Holos” (Ternopil), “Zolochivske Slovo”, etc. In order to compare the historical, cultural and ideological contexts, the texts of some Trans-Dnieper newspapers have been also included, in particular: “Renaissance” (Kyiv), “Vistnyk Ukrainskoyi Narodnoyi Respubliky” (Kyiv, Vinnytsia, Kamianets-Podilskyi), “Nova Rada” (Kyiv). **The purpose** of the research is to outline and analyse the main problem nodes of publications about Velyka Zluka (the Unification Act) in the Galician press space of the ZUNR era, to single out the vectors of influence on the public reception*

of this event, to trace the retransmission in magazines of unanimous and oppositional ideas, vision of the Unification process of by the Galicians and the Trans-Dnieprians. **The methodological basis** is a comprehensive approach to the object of research – the use of analytical, comparative methods and content analysis in addition to general historical ones. An interdisciplinary approach combining historical and press studies is also relevant. **The Conclusions.** The analysis of publications proves the influence of historical, ideological and mental factors on the Unification Act of the UNR and ZUNR. In the Galician press the Unification discourse takes on different interpretive forms, as the articles are of a conceptual, informational and polemical nature, illustrating the desire for national unity and at the same time obstacles on the way to its realization. Comparative parallels with publications in the journals of the Ukrainian National People's Republic make it possible to avoid one-sidedness of evaluation and to present the Unification process in the format of a dialogue of the Ukrainians in Galicia and Naddniprianshchyna.

Key words: the Ukrainian press, the Unification Act of 1919, the Ukrainian People's Republic, the West Ukrainian People's Republic.

ПРОГОЛОШЕННЯ СОБОРНОСТІ УНР ТА ЗУНР: ПРЕСОВИЙ РЕЗОНАНС У ГАЛИЧИНІ

Анотація. У статті проаналізовано дискурс соборності у галицьких часописах, пов'язаний із Актом Злуки – урочистим проголошенням об'єднання Західноукраїнської Народної Республіки (ЗУНР) із Українською Народною Республікою (УНР). Основні тематичні домінанти увиразнено компаративними паралелями із наддніпрянських видань, на основі “пресового діалогу” окреслені суголосні моменти та дискусійні. **Об'єктом дослідження** є галицькі видання “Народ”, “Республіка”, “Републіканець”, “Нове Життя” (усі – Станіславів), “Український Голос” (Тернопіль), “Золочівське Слово” та ін. З метою зіставлення історико-культурної ідеологічного контекстів залучено також тексти деяких наддніпрянських газет, зокрема: “Відродження” (Київ), “Вістник Української Народної Республіки” (Київ, Вінниця, Кам'янець-Подільський), “Нова Рада” (Київ). **Мета дослідження:** окреслити й проаналізувати основні проблемні вузли публікацій про Велику Злуку в галицькому пресовому просторі доби ЗУНР, виокремити вектори впливу на суспільну рецепцію цієї події, простежити ретрансляцію у часописах суголосних і опозиційних ідей, бачення процесу об'єднання галичанами й наддніпрянцями. **Актуальність та новизна** полягає у введенні до наукового обігу маловідомого пресового контенту, який відкриває нові аспекти історичних подій та їх суспільного сприйняття. **Методологічним підґрунтям** є комплексний підхід до об'єкта дослідження – використання, окрім загальноісторичного, також аналітичного, компаративного методів і контент-аналізу. Актуальним для статті є і міждисциплінарний підхід, що поєднує історичну та пресознавчу сфери. **Висновки.** Аналіз публікацій засвідчує вплив на Акт Злуки УНР та ЗУНР історичного, ідеологічного й ментального факторів. Дискурс соборності у галицькій пресі набуває різних інтерпретаційних форм, оскільки статті мають концептуальний, інформаційний та полемічний характер, унаочнюють прагнення до національної єдності і водночас перепони на шляху її реалізації. Компаративні паралелі з публікаціями у часописах УНР дають змогу уникнути однобічності оцінок та представити процес об'єднання у форматі діалогу українців Галичини й Наддніпрянщини.

Ключові слова: українська преса, соборність, Акт Злуки 1919 р., Українська Народна Республіка, Західноукраїнська Народна Республіка.

The Problem Statement. The press space is a wide field for recording, analyzing and understanding complex social processes, in particular those that continued during the turning points in our history. The periodicals of the Liberation Struggle highlight the state-building process on both banks of the Zbruch River and the difficulties that stood in the way of the Unification of Ukrainian ethnic lands within the borders of one state. It was about an external expansion of the eastern and western neighbours, as well as about mental and worldview differences of the Ukrainians themselves. The two empires, Austria-Hungary and Russia,

were state entities with different constitutional rights of citizens, which was reflected at the level of national self-awareness of the Ukrainians. The Unification Act of 1919 is an attempt to realize the centuries-old dream of national unity, to restore the status quo, appealing to princely times. That is why, informational press publications covering the Unification process of the Ukrainian People's Republic and the West Ukrainian People's Republic, usually contained a short historical excursion, described the course of celebrations in the towns of Galicia (in Ukrainian – Halychyna) and Kyiv, they had a distinct emotional component, although the majority of publications were quite similar. Some of them are of a conceptual nature, in particular, a series of articles by Mykola Yevshan in the newspapers “Narod” and “Nove Zhyttia”, in which there is elucidated not only the controversy of political processes of that time, but also the role of culture as the “basis of statehood” and at the same time the result of liberation struggle (all journalistic texts of Yevshan were included in the publication for the first time – Yevshan, 2020).

The Review of Recent Researches. The Unification Act of 1919 is comprehensively researched in the scientific publications in the context of related humanitarian disciplines. It is worth mentioning Ivan Hoshuliak's monograph “Thorny Path to the Unity (from the Idea to the Unification Act)” (Hoshuliak, 2009), thematic scientific collections, such as: “United Ukraine” (Reient, 2004 – 2006), “Sobornism as a Factor of Ukrainian State Formation (to the 90th Anniversary of the Unification Act)” (Pyrih, 2009), “Unification of Ukraine: History and Modernity” (Shaihorodskyi, 2023), “Problems of Studying the History of the Ukrainian Revolution of 1917 – 1921” (Verstiuk, 2019), etc., dissertation studies and numerous articles on the issues of historiography, source studies, law, personal studies. The 4-volume encyclopedic publication “Western Ukrainian People's Republic 1918 – 1923” (ZUNR. Entsyklopediia, 2018 – 2021), which was published on the occasion of the 100th anniversary of the ZUNR, contains information about the press of that time, in particular in the context of Unification. Of great importance for our research is the bibliographical work of Ukrainian press historian Olesya Drozdovska (Drozdovska, 2001). However, the multi-volume edition “Ukrainian Press in Ukraine and the world of the 19th and 20th centuries” covers the content of these magazines the most fully (Romaniuk, et al., 2020, 2022), which is published by the Research Institute of Press Studies of the Vasyl Stefanyk Lviv National Scientific Library of Ukraine. Some aspects of this issue are revealed in the works of Jan Fellerer (Fellerer, 2017), Konstantin Kurylyshyn, Vitaliy Vyzdryk (Vyzdryk & Kurylyshyn, 2022; Kurylyshyn & Haliv, 2024), Mykola Haliv, Volodymyr Halyk, Dmytro Shykitka (Haliv, Halyk & Shykitka, 2024). Important recommendations regarding internal criticism of sources, in particular press publications, are made in the work of Mykola Haliv and Vasyl Ilnytsky (Haliv & Ilnytsky, 2021).

Traditionally, the issue of Unification is actualized in jubilee years. Isolating precisely the press content of a narrow chronological aspect makes it possible to trace the chronology of the Unification of the UNR and ZUNR, echoes of the problems that were relevant at the time and their different receptions, differences in the interpretation of Unification in the ZUNR and UNR press, because the specificity of newspapers is that they are fresh even in a century.

The purpose of the research is to outline and analyse the main problem nodes of publications about Velyka Zluka (the Unification Act) in the Galician press space of the ZUNR era, to single out the vectors of influence on the public reception of this event, to trace the retransmission in magazines of unanimous and oppositional ideas, vision of the Unification process of by the Galicians and the Trans-Dnieprians.

The research methodology is based on a comprehensive approach – the use of analytical, comparative methods, content analysis in addition to general historical ones. The historical method makes it possible to outline the preconditions and ideological essence of political disagreements that arose during the Unification Act, specifics of the social resonance of these events. The comparative approach forms the principle of a “press dialogue”, makes it possible to compare the political situation in the Austro-Hungarian and Russian empires in historical retro and perspective. The interdisciplinary component combining historical and press studies is also relevant.

The Results of the Research. The press, as a mirror and driver of social and political events, stood at the origins of important historical acts of modern times, one of which is the declaration of Unity of Ukraine in January of 1919. The ethnic attraction among different representatives of the same nation, which was in different state formations, led to the formation of a common historical and cultural space. Numerous journalistic and analytical journal publications contributed to the construction of geographical, ideological and worldview bridges over the Zbruch river: “Materials published in the Western and Eastern Ukrainian press convincingly testify that the unity-state movement was observed in Naddnistriansky and Naddnipriansky Ukraine in 1918. For example, the proclamation and existence of the Ukrainian People’s Republic had a great impact on the Galician Ukrainians (Zavalniuk, pp. 13–14). A brief review of the periodicals of the ZUNR era and the sequence of their establishment was given by Lonhyn Tsehelskyi in the article “Development of the Ukrainian Press” (Tsehelskyi, 1918, p. 3).

Back in 1848, the Main Ruthenian Council in Lviv in the “Appeal to the Ruthenian People” published in “The Zoria Halytska” magazine, Part 1, declared the following: “We, the Ruthenians of Galicia belong to the great Ruthenian people, who speak one language and make up 15 million, of which one and a half million inhabit the Galician land” (Vidozva do ruskoho narodu, 1848, p. 1). The T. Shevchenko Days celebrations, which spread across Galicia from the 60s of the 19th century, had a strong influence on the formation of the idea of Unity. The cult of the poet contributed to the spiritual unity of the Ukrainian nation and became one of the key factors in the state-building process. World War I gave the peoples of Central-Eastern Europe, which were previously part of the empires, a chance to gain state independence, but for the Ukrainians, realization of this chance was complicated by the armed claims of neighbours from the East and West. Certain obstacles were created on the way to political unification by differences in political priorities as a result of a long stay of the Ukrainians within different state systems. The constitutional freedoms that the Ukrainians had in Austria-Hungary were made possible through political activity in Parliament, the national press, the Societies “Prosvita”, “Native School”, “The T. Shevchenko Scientific Society” and the others to form a certain public consensus on the issue of statehood. The political struggle for equality on the basis of the current constitution continued, “stubborn resistance against national and social enslavement under the wings of Austrian administrative power, which was observed in Polish hands, all the nationally creative work of several generations before the war had to develop national consciousness of people to a level at which the competition for the highest ideal of each nation would be born” (Kuzma, 1931, pp. 7–8), – noted Oleksa Kuzma in the book “November Days of 1918”. Therefore, in the periodicals published in Western Ukraine in 1919, the Unification issue with Great Ukraine was among the priorities. On the other hand, in the Dnipro region, where a cultural and political life could not develop normally as a result of the Valuyev circular and the Emsky decree, press and

book publishing in the native language was prohibited, nation-oriented intelligentsia were harshly persecuted, such a consensus could not be formed. Publications in the Ukrainian language were published only in 1905, and after the outbreak of World War I they were again banned by the government. During the Liberation Struggle, although the issue of unification was discussed, the focus was on the inter-party struggle, the situation on the fronts, and informing about current events.

State-building processes in Ukraine continued against the background of attempts to substantiate the national issue in Europe at the end of the war theoretically. The fate of any nation ceased to be an internal matter of the state-empire and became the matter of the nation itself. The publications of Kyiv daily the "Vidrodzhennia" emphasized that Ukraine had the right to national self-determination within its ethnographic boundaries, according to "Wilson's 14 points", and the basis of this process was laid by the Universals of the Ukrainian Central Rada. The solution of the "Ukrainian issue" within the borders of the former Russia is not final, because "the Ukrainian people live... also within the borders of Austria-Hungary" (Kyiv, 1918, p. 1), therefore, in the future, the lands of Galicia, Chełm region, Bukovyna, and the Ukrainian part of Bessarabia claimed by the Poles, the Hungarians, and the Romanians should be included in Ukraine. However, the Ukrainian Central Rada did not initially prioritize the construction of an independent united Ukrainian state: "This is proven by its universals, where in the first place everything is the matter of rebuilding the entire Russian empire, and also the members of the Central Rada admit that influence" (Do problemi, 1936, p. 4). Such a trend was often considered a consequence of the influence of Mykhailo Drahomanov's ideas on a whole generation of the Ukrainian intelligentsia. According to a modern historian I. Hoshuliak, "a recognized leader of the liberation movement [Mykhailo Hrushevskiy] considered national territorial autonomy, by which he understood the unification of all ethnic Ukrainian lands into one territorial unit, to be the most appropriate form of organization of the state life of the Ukrainian people during the period under consideration" (Hoshuliak, 2009, p. 119). Such an approach a priori envisaged the federation with Russia of other ethnic Ukrainian lands, and therefore it is difficult to call it a state one. The socialist government of the Ukrainian People's Republic expressed concern about the declaration of a "bourgeois dictatorship" in Galicia and sought unifying trends on a social, rather than a national, basis: "Without violating the rights of the Galician peasantry and workers to organize their own internal life, the Socialist Government, in the interests of the working people, must firmly proceed to establish a single government of workers in both regions of the Republic" (Halytski Spravy, 2019, p. 2).

Worldview and mental differences were so tangible, emphasized M. Yevshan in the article "Ukrainian Borders" in the columns of the newspaper "Narod", that a formal declaration of unification could not overcome them: "In addition to the solemn declarations about the Unification Act, in addition to the pathetic declarations about the two brothers who stung the same sheaf, there is still a strong political, and even stronger and almost insurmountable cultural and spiritual border or rather borders at this time. From abroad, as if from behind a fence, our native brothers are looking at, sending polite telegrams to each other, but still keeping gendarmerie in reserve" (Yevshan, 1919, p. 2). Everyone is afraid that the other will not attack his house and take away power, so he tries to "take care" of his brother and establish the correct order, in his opinion.

In the context of covering the revival of Ukraine's statehood, magazines appealed to the traditions of the princely era – this ensured historical legitimacy. In the newspaper

“Republikanets” in a leading article “United Ukraine (the Editorial Board dedicates it to the Proclamation of Unification of both Ukrainian Republics by Vysoka Rada)” regarding the decision made on January 3, 1919 it was emphasized: “Until the modern wave, the Ukrainian politics did not have such a mature point of view. On January 3, 1919, the Ukrainian nation declared clearly and decisively: We want to belong to Kyiv! We want the unity of the lands of Volodymyr the Great, we want the state unity of all my ethnographic territories!” (Zyednana Ukraina, 1919, p. 1). In the article “Great Holiday of Unity in Kyiv (January 22 and 23, 1919)” it is noted that Kyiv is the city of independent Ukrainian princes, where for hundreds of years our people served “cunning enemy raiders”, now it has once again become “the capital of a great Ukrainian state from the Don to the Sian” (Velyke sviato, 1919, p. 1). A detailed description of the city, decorated with national flags, the Triumphal Arch at Sofia Square, decorated with the coats of arms of Ukrainian lands, highlighted the epochal nature of the event. Vasyl Pachovskyi also referred to ancient times as an argument for the restoration of statehood in the article “Historical Right to Unification of Ukrainian Lands”: even when Oleh Vischyi went to Tzarhorod, “the white Croats (inhabitants of Galicia) and Dulibs (inhabitants of Volyn and Chelm region) took part in this campaign, the second time our lands were united with Kyiv under Volodymyr the Holy, the third time it was done by Yaroslav the Wise, the 4th one – under the rule of Roman Mstyslavovych” (Pachovskyi, 1919, p. 3). For the author, this was not a journalistic pathos: he devoted all his work to unraveling a “mystical riddle of his people”, and his epic “The Golden Gate” with its antagonistic images of the Knight Michael and Mark the Accursed embody the dichotomy of loyalty and betrayal, life and death. The author sincerely believed that the opinion of Ukrainians would decide the fate of Eastern Europe when they realize the right of their statehood.

The realization of the idea of universality gives the Ukrainians a unique historical chance that cannot be missed: other peoples will respect us more, but our enemies will try to enslave us again with a greater zeal – this controversy formed the basis of the publication of the newspaper “Ukrayinsky Holos”. The acquisition of statehood can put an end to a systematic destruction of the Ukrainian elite by the Russian authorities: “The dream of our great-grandfathers, grandfathers and fathers, the burning desire of our fighters, who sowed the fields of their native country with their bones, or died in the kazymates and taigas in Siberia, the great idea of unifying Ukraine became a reality” (Bo pora tse velykaya yest..., 1919, p. 1). The editors interpreted the concept of unity as the resurrection of Ukraine and its forty million nation: “Borders have collapsed between us, there are no more Russian, Galician, Bukovyna and Hungarian Ukraine, there are not even two Ukrainian Republics – there is only one large Ukrainian Republic”, which is equal in size to the former Austria-Hungary, and also the first in Europe in terms of wealth.

The concept of “border” – political, ideological, mental – becomes in M. Yevshan’s interpretation a kind of marker, antithetical to the concept of “unity”. The traditions of the princely times are interpreted rather as a negative legacy, actualizing the concept of a civil strife, the practice of dividing the state into separate principalities and transferring them to their sons or boyars as a “private property”. The tendency to secession was inherited by the following generations: “And when we look at those borders (especially the Galicia-Kyiv border) from such a historical perspective, which we found in the wave of the solemn Unification of the two Ukrainian Republics (and not yet the united republic of Magyar, Bukovyna, etc.), then the matter will not seem so easy that it can be decided by any act” (Yevshan, 1919, p. 2). The editors of “Vistnyk Ukrainskoyi Narodnoyi Respubliky”, an organ of the Ukrainian People’s

Republic, also noted in the context of the background of the process that this was rather a declaration without necessary legal processes: the UNR and the ZUNR pursued separate foreign and domestic policies and had independent administrative bodies. In the socio-political plane, the government of the Ukrainian People's Republic focused on the "working masses", and the ZUNR – on the intelligentsia, industrialists and clergy, called "bourgeoisie" for ideological reasons. Nevertheless, the proclamation of the Unity was interpreted as a long-awaited and necessary unification of "two torn parts of one national body, related by the same political and social ideals, one great goal and one immeasurable national grief of the working Ukrainian masses of Galicia and Naddnyprianshchyna" (Obiednannia, 1919, p. 2). The sequence of the Unification process of the two states in the legal sphere, distribution of powers between the Ukrainian National Council, the Directory and the State Secretariat, a personal representation in the authorities was highlighted in the article "Who has Power in Ukraine?" (Kho maye vlast na Ukraini?, 1919, p. 7), published in the "Narod" newspaper.

The Unification Act as a resonant historical event was widely covered in the columns of the Galician press, which after the November Revolution of 1918 and the declaration of the ZUNR "stood in the position of Ukrainian statehood, subordinating all other issues to it" (Krevetskyi, 1919, p. 2). The leading article "By the Publishing Committee" of the magazine "Nova Rada" (Lviv) aimed at "concentrating the work around one hearth – the good of the dear Motherland, United Nenko Ukraine". We just need to show the society its tasks in the modern era and awaken a sense of civility" (Vid vydavnychoho komitetu, 1919, p. 1). And although the prospects for the realization of Ukraine's independence became less and less realistic over time, the editors emphasized that "the Ukrainian people will not retreat from their ideal of united Ukraine" (Polshcha i Halychyna, 2020, p. 1). This thesis was addressed both to the Polish occupation authorities for the purpose of warning and to the readers for the purpose of their moral support. The admonition to fight for one's rights, without turning "on the wrong side", was echoed in other editorials as well.

Petro Karmanskyi was present during the celebrations at Sofia Maidan, representing the Ukrainian National Council, which is why the events of January 22 in Kyiv were the most accurately covered in the columns of "Ukrayinsky Holos", which he edited for some time. In addition to general visual impressions presented according to chronology ("at 11 o'clock in the morning, the Ukrainian military infantry units began to arrive at the square and music sounded"), the article "Celebratory Proclamation of the Unity of Galicia with Ukraine in Kyiv" contains a detailed description of the mood of the thousands at Maidan eager to witness a unique historical event. Many even, like the evangelical Zacchaeus, climbed trees at the square and nearby streets. Representatives of Galicia and Bukovyna, delegations from ministries and other institutions, church leaders took their places, members of the Directory arrived by car, the national anthem of Ukraine sounded with shouts of "Glory!", and the ceremony was led by the artist Sadovskyi. Protocol details, enlivened by apt comparisons and an almost artistic style, betray the pen of a young music editor. "The Ukrayinsky Holos" called on Galicians to join the all-Ukrainian issue, because "today we are something united and indivisible; one blood and one body" (Karmanskyi, 1919, p. 2).

Mykola Holubets' article in "Zolochivske Slovo" was no less emotionally strained. The emphasis is not on the chronicle of events, but on its historical regularity as the realization of T. Shevchenko's prophetic visions: "What Shevchenko dreamed of in his Siberian slumbers, what so many hearts, big and small, sighed for, what was the ultimate goal of the efforts of entire generations – the Ukrainian State – is appearing before our eyes" (Holubets, 1919, p. 1).

Celebrations in Kyiv were preceded by celebrations in Stanislaviv and district towns of the ZUNR. The articles “Unification of the Ukrainian Republics” in “Narod”, “Celebratory Tour of the Proclaimed Unification of Ukraine” in “Strytskyi Vistnyk”, “Sviato u Nashomy Horodi” in “Zolochivske Slovo”, “Historical Event” in “Holos Kalusha” and the others highlighted the support of Galicians for the decision of the Ukrainian National Council on Velyka Zluka.

If the Naddnyprianska press interpreted the national liberation primarily in the context of the end of Russian enslavement, then the Naddnistrianska press – the Polish one. The newspaper “Strytskyi Vistnyk” wrote that the Ukrainian National Council was on the way to fulfilling the will of those glorious sons of Ukraine, “who, whether with weapons in their hands or political action from six centuries, ever since the Polish annexationists tore apart the living body of the Ukrainian people, they have been making every effort to reunite all Ukrainian lands into one whole” (Ideal tsiloi natsii, 1918, p. 4). The editors of Kamianets-Podilskyi magazine “Zhyttia Podillia” in the context of assessing the historical significance of the Unification Act also strongly opposed the federation with Russia proclaimed by the provisional workers’ and peasants’ government, as well as against the Romanian occupation of Bukovyna, Polish claims to the Chełm region and Podlachia. There was also a sharp criticism of the left-wing parties, which sought to introduce the dictatorship of the working proletariat (without the peasantry) in Ukraine and implement the ideas of a worldwide international: “The idea of the Ukrainian state system, the idea of the development of culture, education of the Ukrainian people through the formation of a native school, disappeared from their worldview and became so secondary and insignificant that it is embarrassing to even talk about it in a “serious” party meeting” (Kamianets na Podilliu, 1919, p. 2).

M. Yevshan noted the existence of another social conflict in Galicia, when “the masses of the people, for example, in recent times were clamoring for a unity “with Ukraine”, but the advanced intelligentsia did not want it” (Yevshan, 1919, p. 2). Such a generalization should not be taken as an ultimatum, the author obviously had in mind not the entire intelligentsia, but the ambassadors to Viennese Parliament who did not support the idea of the November Zryv. In the newspaper “Respublikanski Visti” (Vinnytsia), against the background of a historical excursion about the national revival in Galicia, the role of Taras Shevchenko and Ivan Franko in it, it was also noted that not all Ukrainians sought unification: “When the war broke out, all the youth rallied under the banner of the unity of all Ukrainian lands and the independence of Ukraine. However, the politicians still maintained their positions, and although the general programme proclaimed the independence and unification of the Ukrainian lands, they still pursued an Austrophile policy” (K. M., 1919, p. 1). These words from the article “Unification of Ukraine” depict a somewhat different axis of oppression than that of Yevshan: not the intelligentsia and the masses, but the youth and leading politicians. The ambassadors really hoped to the last that the Austrian government would officially transfer power to the Ukrainian National Council, so they arrived in Lviv on November 2-3. Instead, Dmytro Vitovskyi, considering the decision of the Poles to transfer the liquidation commission from Kraków to Lviv, considered it necessary to immediately seize power first, and he did it on November 1, 1918, because he considered it a matter of national honour. For the ambassadors, this action could be “unnecessary, and even compromising and dangerous ventures”, according to Vasyl Paneiko (Paneiko, 1928, p. 1).

The newspaper “Holos z nad Buhu” (Sokal) in the article “The Holiday of Unification of Ukraine” also mentions T. Shevchenko’s “presence” in the epochal days in Kyiv, testifying

to the aforementioned relationship between the cult of the poet and the concept of statehood: "From the very morning, the city took on a solemn appearance. Houses are decorated with carpets, portraits and busts of Shevchenko, national ribbons and flags" (Sviato obiednania Ukrainy, 1919, p. 1). And the publication about the Labour Congress in Kyiv focuses on the episode of the head of the delegation from the ZUNR, Dr. Lonhyn Tsehelskyi, delivering Charter on Unification and shouts of "Glory!"

The gathering of forces is a necessary condition for a successful state policy, especially when this gathering is spontaneous. Kyiv became the "centre of gravity" of the nation, soldiers from the Kuban, Bessarabia, the Crimea, Bukovyna, Halychyna, Chełm region and other lands shed their blood on its streets, defending the capital. The war mobilized the Ukrainians, making them feel like a single nation. The Unification Act was also made possible by the military victory of the Ukrainian Sich riflemen, who had been hardened in battles since 1914 and were, according to the definition of scholars, the army without a state, just like the UPA. A modern historian Mykola Lazarovych observed: "With their achievements and self-sacrifice, the riflemen wrote heroic pages in the annals of the fighters' achievements for the freedom of Ukraine. Bright stages of self-sacrificing work aimed at awakening and establishing a sense of national dignity among the Ukrainians, and the idea of the state unity and the state independence are also associated with the USS" (Lazarovych, 2024). In a situation where the UNR was threatened by danger from all sides, the Sich riflemen played a significant role not only in the victories of the Ukrainian army, but also in the national self-awareness of the people of Naddniprianshchyna.

The proclaimed creation of a united Ukrainian state provided for its protection. In the article "Independence of Ukraine and the Entente", Mykhailo Halushchynskyi updated the issue of the role of international support. In his opinion, it is not worth counting on the help of the Entente, nor on Russian democracy (ironically called "good Russians" today), because "Russian democracy in relation to the Ukrainian national movement is not different from Russian reactionary circles" (Halushchynskyi, 1919, p. 1). This thesis is reminiscent of Vynnychenko's well-known statement that the Russian democracy ends where the Ukrainian issue begins. As for the Entente, M. Halushchynskyi appealed to the recent situation, when German troops entered Ukraine with the consent of the Central Rada, but did not find forces on which they could rely. Therefore, the primary task is the formation of an anti-Bolshevik front by the Ukrainians themselves to preserve statehood. Was this approach constructive? From the height of time, we know not only how much the help of other countries weighs in today's war, but also that Poland will involve the French Haller army, aimed at fighting with the Bolsheviks, to destroy the ZUNR, and that the withdrawal of German troops from the territory of Ukraine will coincide with times with the advance of the Red Army in the East. Because the Directory government never managed to find a common language with the Entente states. These events testify to the cyclical nature of history, encourage its study in order to avoid the mistakes of the past.

The Conclusions. The analysis of publications is the basis for conclusions about the influence of a wide range of factors: historical, ideological and mental on the Unification Act of January 22, 1919. The articles about Unification in the newspapers of the ZUNR era are of a conceptual, informational and polemical nature, illustrating both the desire for national unity and the obstacles that stood in the way of its realization. Comparative parallels with publications in the journals of the Ukrainian State and the Ukrainian People's Republic make it possible to avoid one-sidedness of assessments and to present the Unification process in the format of a dialogue of the Ukrainians of Galicia and Naddniprianshchyna.

The press evidence about the spontaneous movement towards national unity, connected with the historical memory of the people, which has survived despite 300 years of enslavement, examples of a heroic self-sacrifice, as well as theoretical considerations about the ways of national development do not lose their spiritual and intellectual value, but need updating and rethinking under new historical conditions.

Acknowledgement. We express sincere gratitude to all members of the editorial board for consultations provided during the preparation of the article for publishing.

Funding. The authors did not receive any financial support for the publication of the article.

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*The article was received March 28, 2024.
Article recommended for publishing 29/11/2024.*

UDC 351.74(477.82=162.1):796[“1919/1939”
DOI 10.24919/2519-058X.33.317477

Oleh RAZYHRAJEV

PhD hab. (Historical Sciences), Professor, Professor of the Department of World History, Lesya Ukrainka Volyn National University, 24 Chopin Street, Lutsk, Ukraine, postal code 43000 (razygraev@ukr.net)

ORCID: 0000-0003-0480-6936

Researcher ID: rid7558

Web of Science Researcher ID: HSH-3113-2023

ScopusID: 57810432500

Mykhailo KUNYTSKYI

PhD hab. (Historical Sciences), Professor, Professor of the Department of Information Technologies and Tourism, Lutsk Institute of Human Development of the University “Ukraine”, 5 Georgy Gongadze Street, Lutsk, Ukraine, postal code 43000 (infovinconsulmd@gmail.com)

ORCID: 0000-0001-7347-1151

Олег РАЗИГРАЄВ

доктор історичних наук, професор, професор кафедри всесвітньої історії Волинського національного університету імені Лесі Українки, вул. Шопена, 24, м. Луцьк, Україна, індекс 43000 (razygraev@ukr.net)

Михайло КУНИЦЬКИЙ

доктор історичних наук, професор, професор кафедри інформаційних технологій та туризму Луцького інституту розвитку людини Університету “Україна”, вул. Георгія Гонгадзе, 5, м. Луцьк, Україна, індекс 43000 (infovinconsulmd@gmail.com)

Bibliographic Description of the Article: Razyhrajev, O., & Kunytskyi, M. (2024). Sports in the life of Polish State Police officers in 1921 – 1939. (on the example of Volyn Voivodeship). *Skhidnoievropejskyi istorychnyi visnyk [East European Historical Bulletin]*, 33, 129–138. doi: 10.24919/2519-058X.33.317477

**SPORTS IN THE LIFE OF POLISH STATE POLICE OFFICERS IN 1921 – 1939.
(ON THE EXAMPLE OF VOLYN VOIVODESHIP)**

Abstract. The state police was a constituent part of the internal affairs bodies in the Second Polish Republic. This institution united three corps: general, investigative (criminal) and political. Its territorial organization corresponded to the administrative division of the state. District (voivodeship) administrations, county administrations, commissariats and precincts (posts) functioned under the leadership of the Main Directorate of the State Police in Warsaw. Since 1919, the above-mentioned state armed body of the executive power began its activities on the territory of Volyn as well, which during the interwar period was part of the newly revived Polish state as Volyn Voivodeship. The everyday life of police officers consisted of service and a private life. An important role was given to physical education, which helped law enforcement officers rest from the performance of professional duties, and at the same time made the body strong and contributed to a better working capacity. Therefore, **the purpose of the**

research is to study individual manifestations of the sports life of Polish state police officers in 1921 – 1939 (on the example of the Volyn Voivodeship). **The research methodology** is based on the use of general scientific and specially historical research methods, including problem-chronological, synchronous, diachronic, comparative historical and the others. **The scientific novelty** is that the authors tried, on the basis of unpublished archival materials, to highlight certain manifestations of the sports life of Polish state police officers in 1921 – 1939 (on the example of Volyn Voivodeship). **The Conclusions.** In the first decade of the interwar twenty years, the sports life of Volyn police officers was not distinguished by activity and was limited mainly to football matches, athletics and shooting. At the end of the 1920s, police sports clubs appeared in various towns of the Volyn Voivodeship (Lutsk, Rivne, Zdolbuniv (“Zoriia”), Kovel (“Turiiia”), Kremenets (“Horyn”). Such clubs consisted of sections according to sports (football, hockey, shooting, boxing, etc.). As a rule, police sports clubs had their own statutes that regulated their activities. Such an institution was headed by a board consisting of a president, vice-president, treasurer and secretary. The highest body of the club was the general assembly.

The first sports competitions of policemen in Volyn took place at the end of July of 1928 in Lutsk under the protectorate of Volyn Voivode Henryk Józewski. In June of 1933, sports competitions organized by the efforts of the local police sports club took place in Rivne. The following year, cycling competitions were held in the voivodeship centre. Volyn police officers also took part in national competitions in Warsaw, where they also demonstrated quite high results.

Key words: Volyn, Poland, police, sport, competition.

СПОРТ У ЖИТТІ СЛУЖБОВЦІВ ДЕРЖАВНОЇ ПОЛІЦІЇ ПОЛЬЩІ У 1921 – 1939 рр. (НА ПРИКЛАДІ ВОЛИНСЬКОГО ВОЄВОДСТВА)

Анотація. Складовою частиною органів внутрішніх справ Другої Речі Посполитої була державна поліція, яка об'єднувала три корпуси: загальний, слідчий (кримінальний) та політичний. Її територіальна організація відповідала адмінподілу держави. Під керівництвом Головного управління державної поліції у Варшаві функціонували окружні (воєводські) управління, повітові управління, комісаріати та дільниці (пости). Із 1919 р. зазначений державний озброєний орган виконавчої влади розпочав діяльність також на теренах Волині, яка впродовж міжвоєнного періоду входила до складу нововідродженої польської держави як Волинське воєводство. Повсякдення працівників поліції складалося зі служби та приватного життя. Вагома роль тут відводилася фізичному вихованню, яке допомагало правоохоронцям відпочити від виконання професійних обов'язків, водночас загартовуючи організм, і сприяло кращій працездатності. Відтак, **метою запропонованої статті** є дослідження окремих проявів спортивного життя службовців державної поліції Польщі у 1921 – 1939 рр. (на прикладі Волинського воєводства).

Методологія дослідження ґрунтується на використанні загальнонаукових та спеціально історичних методів дослідження, зокрема, проблемно-хронологічного, синхронного, діяхронного, порівняльно-історичного та ін. **Наукова новизна** полягає у тому, що автори спробували на основі неопублікованих архівних матеріалів висвітлити окремі прояви спортивного життя службовців державної поліції Польщі у 1921 – 1939 рр. (на прикладі Волинського воєводства).

Висновки. У першій декаді міжвоєнного двадцятиліття спортивне життя волинських поліцейських не вирізнялося активністю й обмежувалося переважно футбольними матчами, заняттями легкою атлетикою та стрільбою. Наприкінці 1920-х рр. в різних містах Волинського воєводства постають спортивні клуби поліції (Луцьк, Рівне, Здолбунів (“Зоря”), Ковель (“Турія”), Кременець (“Горинь”). Такий клуб складався із секцій відповідно до видів спорту (футбольна, хокейна, стрілецька, боксерська тощо). Як правило, спортивні клуби поліції мали власні статuti, які регламентували їхню діяльність. Очолювало таку установу правління, яке складалося з президента, віцепрезидента, скарбника та секретаря. Вищим органом клубу були загальні збори.

Перші спортивні змагання поліцейських на Волині відбулися наприкінці липня 1928 р. в Луцьку під протекторатом Волинського воєводи Г. Юзевського. У червні 1933 р. в Рівному пройшли спортивні змагання, організовані зусиллями місцевого поліцейського спортклубу. Вже наступного року у воєводському центрі тривали змагання з велосипедного спорту. Волинські поліцейські також брали участь у загальнодержавних турнірах у Варшаві, де демонстрували досить високі результати.

Ключові слова: Волинь, Польща, поліція, спорт, змагання.

The Problem Statement. Internal affairs bodies are an integral part of the law enforcement system in any country. They constitute human rights units of the state executive power, aimed at ensuring legality and law and order, protection against illegal encroachments on life and freedom of citizens, interests of the state and society. An important element of the internal affairs bodies in the Second Polish Republic was the state police, established in 1919. It consisted of three corps: general, investigative (criminal) and political. Its territorial organization corresponded to the administrative division of the state. Thus, district (since 1924 – voivodeship) administrations, county administrations, commissariats and precincts functioned under the leadership of the Main Directorate of the State Police in Warsaw, that were located on the territory of communes. Since 1919, the above mentioned state armed body of the executive power began its activities on the territory of Volyn as well, which during the interwar period was part of the newly revived Polish state as the Voivodeship of Volyn.

The Review of Recent Research. Naturally, the issue of the past of interwar Polish police units was a subject of interest among Polish historians mainly. In particular, it is worth mentioning the studies by R. Litwiński (Litwiński, 2007), A. Misiuk (Misiuk, 1996), A. Peplowski (Peplowski, 1991) and the others. Domestic Soviet historical science covered the specified issue under analysis in the context of law enforcement officers' resistance to the communist threat on the territory of interwar Western Ukraine. Modern Ukrainian historians study the activities of the Polish police through the lens of repression against the Ukrainian national movement mainly. At the same time, in his studies, Oleh Razyhrayev highlighted the issue of formation, organization and functioning of individual branches of the law enforcement system in Poland (police and prison service) at the national and regional levels (Razyhrayev, 2010a, 2010b; Razyhrayev, 2020a, 2020b; Razyhrayev, 2022a, 2022b, Razyhrayev & Maleonchuk, 2023). In general, the analysis of the above-mentioned studies proves a certain interest of scholars in various issues of organization and activity of law enforcement bodies. On the other hand, much less coverage was given to a daily life of their employees, in particular, sports activity of law enforcement officers. At the same time, certain elements of sports everyday life of police officers were studied by Jacek Dworzecki (Dworzecki, 2010), Robert Litwiński (Litwiński, 2007), Oleh Razyhrayev (Razyhrayev, 2019), Janusz Sowa (Sowa, 2021), Bolesław Sprengel (Sprengel, 2003), Julian Jaroszewski (Jaroszewski, 2022; Jaroszewski, 2024) and the others.

The purpose of the research is to study individual manifestations of the sports life of employees of the Polish state police in 1921 – 1939 (on the example of Volyn Voivodeship).

The Results of the Research. The activities of internal affairs bodies in the region were coordinated by Volyn Voivodeship Department of the State Police, which was located in the city of Lutsk. The above-mentioned body carried out the organization of the police, resolved administrative and personnel issues, and also controlled the activities of all field units of internal affairs bodies. The Volyn Voivodeship Department of the State Police consisted of administrative and economic departments, as well as a military detachment and a reserve. During the period under analysis, the specified body was alternately headed by: an inspector V. Stupnytski (1921 – 1922), a sub-inspector V. Hozdzhewski (1922 – 1924), an inspector Ch. Grabowski (1924 – 1927), a sub-inspector A. Tarnawski (1927 – 1929), an inspector Ja. Plotnytski (1929 – 1934), sub-inspectors K. Ziowski (1935 – 1939) and R. Shtaba (1939) (Litwiński, 2007, p. 541).

The highest structural link of internal affairs bodies within the county was the county department of the state police. As of February 1, 1921, 9 such units of the state police

functioned in Volyn. At the same time, on the eve of World War II, there were 11 district offices, namely: in Volodymyr, Dubno, Horokhiv, Zdolbuniv, Kovel, Kremenets, Kostopil, Lutsk, Luboml, Rivne and Sarny (Razyhrayev, 2010, pp. 88–91; Archives of Modern Records in Warsaw (AMR), z. 349, sygn. 41, pp. 281–293).

State police commissariats of Volyn Voivodeship were on duty on the territory of towns. In the first half of 1926, 5 state police commissariats operated in Volyn. As of 1939, there were 6 of the above-mentioned units operating in Volyn: in Lutsk, Unit 1 and Unit 2 in Rivne, in Kovel, in Kremenets and Ostroh (AMR, z. 349, sygn. 41, pp. 281–293).

State police stations were grassroots and at the same time the most numerous units in the system of internal affairs bodies. The territorial limits of the powers of the above-mentioned police units covered mostly communes (*in exceptional cases, the stations could be located in towns* – O. R.). In 1922 – 1926, from 128 to 200 police stations functioned in the region. As of 1939, there were 181 police stations in Volyn Voivodeship. According to the district localization, the number of stations was as follows: in Volodymyr poviat – 14, in Dubno poviat – 20, Horokhiv poviat – 13, in Zdolbuniv poviat – 13, in Kovel poviat – 23, in Kremenets poviat – 11, in Kostopil poviat – 20, in Lutsk poviat – 19, in Liuboml poviat – 10, in Rivne poviat – 18 and in Sarny poviat – 20 (AMR, z. 349, sygn. 41, pp. 281–293).

The general police corps included employees who served on the territory of the district administration of the state police, poviat offices, commissariats and stations. The main task of the general police was to ensure law and order, protect the interests of citizens, society and state. The issue of combating crime was within the competence of the investigative (criminal) police. Its main tasks included: preventing and solving crimes, conducting investigations in cases of murder, theft, fraud, extortion, usury, countering the anti-state movement (since 1926), etc. As for the political police, it was a special service that operated during the “pre-May period” and carried out a constant monitoring of the socio-political situation and, on this basis, identified and neutralized numerous subversive and anti-state groups.

The everyday life of police officers consisted of service, as well as a private life. A notable role was assigned to physical education, which on the one hand helped law enforcement officers rest from the performance of professional duties, and on the other hand – made their bodies stronger and contributed to a better working capacity. In 1923, the Main Directorate of the State Police in Warsaw organized special physical education courses for police officers, and the following year, special sports units – clubs, circles, sections – began to be established within the police units (Sprengel, 2003, p. 29). At the end of the second decade of the interwar twenty years, standards for organizing the sports life of police officers were unified in the state, and the number of departmental sports clubs numbered several dozens. Since the mid-1920s, national sports competitions had been held in Warsaw (Dworzecki, 2010, pp. 121–122).

In the 1920s, Volyn Police District was one of the least developed sports centres in Poland. With the formation of the voivodeship, sports life in Volyn was limited only to football matches of local clubs (Na Posterunku, 1930, no 42, p. 17). In general, football was the most popular sport among the policemen of Volyn Voivodeship. In the region the first police football club was established at Rivne District State Police Department in June of 1923. Initially, 12 people became its members. Soon, with the financial assistance of the local police library, this organization purchased several sets of sports uniforms and shoes. In the first half of the 1920s, Rivne football club did not have the opportunity to play football due to constant personnel rotations and frequent police missions due to unsatisfactory state of public

security in the poviat (The State Archive of the Volyn Region (SAVR), f. 1. d. 4a, c. 47, p. 16). Volyn policemen went in for athletics. Thus, in May of 1927, police officers of Rivne District Police Department were trained to participate in the all-Polish police sports competition in Warsaw. From Police Commissariat 2 of Rivne, the following officers were selected for the athletics competition – Juzef Jakubowski, Roman Tarnowski and Antoni Golatski (The State Archive of the Rivne Region (SARR), f. 113, d. 1, c. 84, pp. 1–2).

As of October 1927, two police sports clubs were operating in Volyn Voivodeship: “Lutsk” and “Zoriia” (Zdolbuniv). The governing bodies of these clubs were the general meeting, the board and the audit committee. The police sports club in the city of Lutsk was founded by the then voivodeship commandant of the police, sub-inspector Adolf Tarnawski. This club was under the regional police department in Lutsk and there were eight members. Initially, there was only one section – athletics, which developed quite successfully, as evidenced by the success of law enforcement officers at competitions of various levels. Thus, in 1927, members of the Lutsk Sports Club took part in the national police sports competitions in Warsaw, where they won: two first places in the 200 and 400 m races, second place in the Olympic relay, fourth place in the 400 m race, fifth place in the high jump, fifth place in the javelin and fourth place in the long jump. Accordingly, the policemen received the following awards: two silver cigarette cases, eight tokens, eight sports diplomas and five commemorative medals. In addition, in 1927, the Lutsk police sports club won the 3rd prize in the Olyka-Lutsk team march (35 km) (SAVR, f. 1. d. 4, c. 620, p. 4). In the spring of 1930, in this police sports unit there was established a football section, which played fourteen friendly matches from mid-June to the end of September (Na Posterunku, 1930, no 42, p. 17).

Police sports club “Zoriia” in Zdolbuniv was established in 1927 on the initiative of the local district police commandant Stefan Sobesczanski. Initially, it included 35 members who belonged to two sections: athletics and shooting. Members of this club also took part in the all-Polish police sports competition in Warsaw (1927), where they took the prize in running at various distances (SAVR, f. 1. d. 4, c. 620, p. 4).

In Volyn the first police sports competitions took place on July 28–29, 1928, at the stadium of Infantry Regiment 24 in Lutsk under the protectorate of Volyn Voivode Henryk Józewski. They were led by the Deputy Commandant of Lutsk District Police, Deputy Commissioner Liutsjan Menke (Na Posterunku, 1928, no 35, p. 17). The judges were: Kazimierz Hrushzczynski (lieutenant of Infantry Regiment 24), Jozef Palac (a commandant of Volyn District Rifle Association), Janusz Ray (an engineer of the State Forestry Directorate in Lutsk) and Bronislaw Kondratowycz (Professor of Physical Education at the State Gymnasium in Lutsk). In total, about forty participants took part in the competition. The sports programme included competitions in shooting, athletics and swimming. After the competition, on July 30, 1928, an individual march was held along the Lutsk-Kovel route at a distance of 30 km. The newspaper “Przegląd Wołyński” noted on its pages that this sports event took place owing to the support of the state authorities, self-government bodies, as well as individual citizens, who provided the winners of the tournament with valuable gifts. At the same time, the reporter of the above-mentioned newspaper stated that there was little interest in the competition among the public, since, apart from representatives of local authorities, there were almost no spectators (Przegląd Wołyński, 1928, no 32(215), pp. 7–8).

On April 30, 1929, a police sports club called “Turiia” was established in the town of Kovel in Volyn. Its first leader was the head of the police station in Kovel, Deputy Commissioner Dombrowski (Gazeta Administracji i Policji Państwowej, 1929, no 11, p. 34).

The active development of this club fell on the second half of 1929 and was connected with the appointment of the curator of the club Kazimierz Zielowski, the police commandant of Kovel district (SAVR, f. 308, d. 1, c. 16, p. 20). In July of the same year, police athletics competitions were held in Kovel, which included: running (100, 200, 400, 800, 500 m), throwing (discus, javelin, grenades, shot put), high jump and shooting from small-caliber and military weapons Soldiers of Border Rifle Regiment 50 stationed in Kovel under the command of Colonel Józef Liwacz also took part in the competition (Przegląd Wołyński, 1929, no 33, p. 5).

On August 17–18, 1929, under the leadership of deputy commissar Lutsjan Menke, another sports competition of policemen of Volyn Voivodeship was held in Lutsk, in which 72 participants took part. In the presence of Deputy Voivode Szleszynski, Commandant of Voivodship Police in Lutsk, Jan Plotnytski, and Commissioner Gintovt, a delegate from the main police department, the participants competed in running, throwing, jumping, and swimming (Przegląd Wołyński, 1929, no 35, p. 2).

On the initiative of Lutsk Sports Club of the Police, in January of 1931, the first skating track in Volyn Voivodeship appeared on its site, which was illuminated and surrounded by a high fence (Przegląd Wołyński, 1931, no 3, p. 4). It is worth adding that in Volyn the largest track of this nature had an area of 900 square meters and was built on the territory of Rivne police sports club in 1931. This rink had electric lighting, changing rooms, a buffet, a radio and a skate rental point (SARR, f. 115, d. 2, c. 18, p. 3). On January 19–22, 1931, on the initiative of Kremenets police sports club “Horyn”, ski courses were held for the commandants of the poviat police stations. After that, skiing competitions took place on a 2.5 km track. 24 people took part in them. The award (skiing), presented in the presence of the headman Stefan Czarnotski and the district police commandant Roman Makowski, was received by the law enforcement officer Viktor Bisztyga (Przegląd Wołyński, 1931, no 8, p. 4). On January 29, 1933, a hockey match was held in Kovel between the team of the local gymnasium and Kovel police sports club. The result showed the advantage of youth in speed indicators. Instead, the police showed better teamwork (Wołyń, 1933, no 6, p. 7).

The Rivne police club was created on July 1, 1929. During the initial period, it existed only formally. Positive changes in the functioning of this club took place in 1930 – 1932 and were associated with the appointment of Chief Commissioner Antony Zarzytski as the head of the board. According to the charter, the highest body of the club was the general meeting, which elected the board, the audit commission and the arbitration court. The general meeting also approved the plan of the club’s activities, budget issues, changes to the charter, granting the status of honorary membership, elected members of the board and the audit commission, approved the regulations on the general meeting and the board, accepted voluntary donations, and could also prosecute the members of the board and the audit commission (SAVR, f. 115, d. 2, c. 18, pp. 12–14; SARR, f. 116, d. 1, c. 131, p. 5).

The board of the club consisted of the president, vice-president, treasurer and secretary. According to the charter of the Rivne police club, the president was the main representative of the club, supervised the activities of the board members, convened meetings and presided over them. In the absence of the president, his duties were performed by the vice president. The secretary conducted correspondence and set the agenda for meetings of club members, as well as took care of the archive. The duties of the treasurer were related to managing the cash register and responsibility for its condition. The main function of the audit committee was to check the club’s finances and inventory, which was carried out twice a year. In March

of 1932, the board of the Rivne Police Sports Club included the following people: the president – Chief Commissioner Antony Zarzytski, the vice-president – a graduate student Piotr Kulesha, the secretary – senior police officer Stepan Stepula, and the treasurer – Jan Sledz (SARR, f. 116, d. 1, c. 131, p. 3).

Members of the club who were engaged in joint sports were united in a section. The work of the sports sections was coordinated by the board of the club. At the same time, they had a certain economic and financial autonomy. The organizational and sports activities of the sections consisted in the organization of trainings and competitions. To cover expenses related to the functioning and development of the section, funds from two sources were used: membership fees and income from sports events. All members of Rivne Police Sports Club were required to pay monthly membership fees, which as of 1936 amounted to 0.5 zł (SARR, f. 112, d. 1, c. 167, p. 1). The club's expenses were divided into two categories: 1. administrative expenses for the maintenance of the stadium, tennis courts, sports equipment, instructors, etc.; 2. expenses for the purchase of sports equipment. At the beginning of the 1930s, Rivne police sports club had the following sections: football, ice-hockey, skiing, athletics, shooting, cycling and motorcycle. Later the boxing section was founded (SARR, f. 115, d. 2, c. 18, pp. 3–4).

During the 1931 football season, Rivne police football team played 32 matches. It competed not only with Volyn teams, but also with the military sports club "Legia" from Warsaw, Infantry Regiment 22 from Siedlce and the "Maccabi" team from Krakow. The police hockey team was also active in the Rivne district, which played high-level matches against the military sports club "Rivne", as well as the police sports clubs of Kremenets, Kovel, Lutsk, etc. (SARR, f. 115, d. 2, c. 18, pp. 3–4).

On June 16–17, 1933, a small arms shooting competition was held in Lutsk for the championship of Lutsk poviat. The victory was won by the local police sports club, which defeated four teams of the Military Sports Club and received the silver cup. The shooting team was represented by senior pshodovs – I. Boratyn, V. Kubasewycz and L. Zinkewycz, as well as A. Bazant and V. Pikulski (Na Posterunku, 1933, no 33, p. 11).

On June 18, 1933, sports competitions were held in Rivne, organized by the efforts of the local police sports club. 63 law enforcement officers took part in the tournament. The programme of sports events included: shooting with small arms, cycling at a distance of 35 km, pentathlon (100 m run, 400 m run, long and high jump, throwing a grenade) and a volleyball match. Constable Jan Gutman from the 2nd police station in Rivne took first place in shooting and received a prize in the form of a watch. The second place was won by Stanislav Novakovski, a senior constable of the investigative department in Rivne. Policeman Pavel Hepner from the police station in Bugryna took first place in the bicycle race. He also received a watch as a reward. At the same time, constable Stanislav Sikora from the railway police station in Rivne received only a briefcase for second place. In the pentathlon, police officer Leon Urbanovych from the Rivne investigative department took the first place, who was awarded a silver cigarette case. Employees of the same unit won the first place in the volleyball match (Na Posterunku, 1933, no 29, p. 12).

The report of the Volyn Voivodeship State Police Department for the 4th quarter of 1933 shows that the police sports clubs worked very intensively. Boxing and football training took place on a permanent basis. Ski sections also operated actively. In particular, in the Volyn Voivodeship, 850 policemen were equipped with skis, which were used not only for sports, but also for the performance of official duties. In the first half of March 1934, on the basis of the order

of the Main Directorate of the State Police, shooting competitions of law enforcement officers were held in the districts of the Volyn region, and on March 25, the all-voivodship shooting competitions were held, in which 34 policemen took part (SAVR, f. 1, d. 2, c. 3581, p. 13). In June of 1934, a cycling competition for the championship of Volyn took place in Lutsk. They were attended by 24 people representing six police sports clubs. Lutsk law enforcement officers took the first place (*Gazeta Administracji i Policji Państwowej*, 1934, no 14, p. 27).

In April of 1937, during a meeting of the district police commandants of the Volyn Voivodeship, the head of the administrative department of the Volyn Voivodeship State Police Department, Commissar Yana Berenda, noted that shooting was the most popular sport among law enforcement officers. Its development was actively supported by the police leadership, who believed that the efforts of departmental sports clubs should be aimed at improving the quality of shooting skills of law enforcement officers. However, according to the head of the military department of the Volyn Voivodeship State Police Department, Commissioner Zdislav Faliszewski, “the accuracy of the policemen’s shots left much to be desired due to the neglect of recent marksmanship training”. According to the results of the meeting, the management of the Volyn police recommended to their subordinates to continue classes related to gymnastics, swimming, rowing and to perform exercises to overcome obstacles in the area (SAVR, f. 1, d. 4, c. 1433, p. 20).

As of 1937, there were five police sports clubs operating on the territory of the Volyn Voivodeship – Lutsk, Kovel, Volodymyr, Rivne and Kremenets. The largest sports club – Lutsk – was headed by the commissioner Jan Berenda mentioned above. The following sections operated within the club: rowing, athletics, shooting, football, cycling, swimming and skiing (Dworzecki, 2010, pp. 121–124). In May of 1937, a scandal broke out during a football match between the Kremenets sports team and the Lutsk police sports club. The newspaper “*Życie Krzemienieckie*” reported that the people from Lutsk, having failed to defeat the team from Kremenets, “looked for help in strength and brutality”. As a result, the victory was won by the Kremenets team (*Życie Krzemienieckie*, 1937, no 21, p. 446).

Going in for sports was also included in the programme of training courses for police officers. As a result of the understanding of the Ministry for Justice with the Main Directorate of the State Police, prison employees could also participate in such classes. The prison staff were subject to the same disciplinary principles as the police and the obligation to listen to the entire course, arrive in full uniform with a carbine and revolver, and have sports clothes with them.

The Conclusions. Therefore, sports was an important part of the everyday life of police officers. Exercising helped law enforcement officers to recover after performing their professional duties, strengthened the body and improved performance.

In the first decade of the interwar twenty years, the sports life of Volyn police officers was not distinguished by activity and was limited mainly to football matches, athletics and shooting. At the end of the 1920s, police sports clubs appeared in various cities of the Volyn Voivodeship (Lutsk, Rivne, Zdolbuniv (“Zoria”), Kovel (“Turia”), Kremenets (“Horyn”)). The club consisted of sections according to sports (football, hockey, shooting, boxing, etc.). As a rule, police sports clubs had their own statutes that regulated their activities. Such an institution was headed by a board consisting of a president, vice-president, treasurer and secretary. The highest body of the club was the general meeting.

The first sports competitions of policemen in Volyn took place at the end of July 1928 in Lutsk under the protectorate of Volyn Voivode Henryk Józewski. In June of 1933, sports

competitions organized by the efforts of the local police sports club took place in Rivne. The following year, cycling competitions were held in the voivodeship centre. Volyn police officers also took part in national competitions in Warsaw, where they also demonstrated quite high results.

Acknowledgements. The authors of the article express their gratitude to the employees of archival institutions of Ukraine and Poland for their assistance in conducting the research.

Funding. The authors did not receive any financial support for the publication of the article.

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The article was received February 24, 2024.

Article recommended for publishing 29/11/2024.

UDC 94(477.83/.86):061.2“1920/1930”
DOI 10.24919/2519-058X.33.317455

Dmytro BONDAR

PhD (Public Administration), Rector of Lviv State University of Life Safety, 35 Kleparivska Street, Lviv, Ukraine, postal code 79000 (d.bondar.ldubgd@gmail.com)

ORCID: 0009-0004-9571-7828

Volodymyr BAKALA

Postgraduate student, Vasyl Stefanyk Precarpathian National University, 57 Shevchenko Street, Ivano-Frankivsk, Ukraine, postal code 76000; Senior Researcher, Oleksa Dovbush Ivano-Frankivsk Historical and Memorial Museum, 1 Hetman Ivan Mazepa Street, Ivano-Frankivsk, Ukraine, postal code 76000 (volodjabakala@gmail.com)

ORCID: 0009-0003-8766-3818

Дмитро БОНДАР

кандидат наук з державного управління, ректор Львівського державного університету безпеки життєдіяльності, вул. Клепарівська, 35, м. Львів, Україна, індекс 79000 (d.bondar.ldubgd@gmail.com)

Володимир БАКАЛА

аспірант, Прикарпатський національний університет імені Василя Стефаника, вул. Шевченка, 57, м. Івано-Франківськ, Україна, індекс 76000; старший науковий співробітник, Івано-Франківський історико-меморіальний музей Олекси Довбуша, вул. гетьмана Івана Мазепи, 1, м. Івано-Франківськ, Україна, індекс 76000 (volodjabakala@gmail.com)

Bibliographic Description of the Article: Bondar, D., & Bakala, V. (2024). The Fire-fighting Activities of the National and Cultural Societies in Eastern Galicia in the 1920s – 1930s. *Skhidnoievropeiskyi istorychnyi visnyk [East European Historical Bulletin]*, 33, 139–148. doi: 10.24919/2519-058X.33.317455

THE FIRE-FIGHTING ACTIVITIES OF THE NATIONAL AND CULTURAL SOCIETIES IN EASTERN GALICIA IN THE 1920s – 1930s

Abstract. *The purpose of the research is to elucidate the development of fire-fighting movement in Eastern Galicia in the 1920s and 1930s through the prism of the history of national cultural societies in the region: “Gymnastics and Fire Society “Sokil” / “The Ukrainian Sports Society “Sokil-Batko”;* *Rukhanka Fire Society “Sich” / Rukhanka Fire Society “Luh”.* **The methodology of the research** is based on the principles of scientificity, historicism, structuralism and criticality. There have been used general scientific methods of scientific knowledge (analysis, synthesis, generalization) and special historical methods: historical genetic, historical systemic, historical typological, historical comparative. There has been applied a problem chronological approach in order to clarify the main aspects of the fire-fighting movement in the historical retrospect, as well as a systemic structural approach in order to determine the historical development patterns of the fire-fighting movement during the interwar period. **The Scientific Novelty.** *Based on a wide historiographical and source base, the main milestones in the fire-fighting direction formation of the Sokil-Sich societies in the 1920s and 1930s have been outlined*

thoroughly; the forms of this activity have been generalized. **The Conclusions.** Due to World War I and the national competitions for the Ukrainian statehood, including the Polish-Ukrainian War, there was the decline of national cultural societies, in particular, the rukhanka-fire societies, such as “Sokil”, “Sich”. The institutional restoration of these societies faced a considerable resistance by the Polish administration, which was not satisfied with the national patriotic direction of organizations, their active practical activities in training young people, teaching military affairs, and later fire defense. Despite the fact that the fire-fighting societies “Sokil” and “Sich” from the beginning of their activities, and later in a restored form during the interwar period, became a significant support for state fire-fighting for ideological reasons, especially after the beginning of the “pacification” measures, their activities were limited or prohibited.

Key words: fire-fighting movement, Sokil-Sich organizations, fire-fighting movement societies “Sokil”, “Sich”, “Luh”.

ПРОТИПОЖЕЖНИЙ НАПРЯМ ДІЯЛЬНОСТІ НАЦІОНАЛЬНО-КУЛЬТУРНИХ ТОВАРИСТВ НА СХІДНІЙ ГАЛИЧИНІ В 1920 – 1930-х рр.

Анотація. Мета дослідження. Висвітлення розвитку протипожежного руху на Східній Галичині у 1920 – 1930-х рр. крізь призму дослідження національно-культурних товариств краю “Гімнастично-пожежного товариства «Сокіл»”/“Українського спортивного товариства «Сокіл-Батько»”; руханково-пожарного товариства “Січ”, а після його заборони – руханково-пожарного товариства “Луз”. **Методологія дослідження** базується на принципах науковості, історизму, структурності та критичності. Використані загальнонаукові методи наукового пізнання: аналізу та синтезу, узагальнення допомогли визначити роль національно-культурних товариств Галичини в окреслений період; завдяки проблемно-хронологічному проаналізовано головні проблеми діяльності протипожежного руху в послідовній ретроспективі; системно-структурний – сприяв виділенню закономірностей розвитку руху у міжвоєнний період. **Наукова новизна.** На підставі широкої історіографічної та джерельної бази ґрунтовно окреслено головні віхи становлення протипожежного напрямку діяльності сокільсько-січових товариств у 1920 – 1930-ті рр., узагальнено її форми цієї. **Висновки.** Перша світова війна та національні змагання за українську державність, зокрема і польсько-українська війна, спричинили занепад національно-культурних товариств руханково-пожежного спрямування, таких як “Сокіл”, “Січ”. Інституційне відновлення цих товариств зустрічало чималий супротив польської адміністрації, яку не влаштовувало їхнє національно-патріотичне спрямування, активна практична діяльність із вишколу молоді, навчання військової справи, а згодом й пожежної оборони. Незважаючи на те, що протипожежні товариства “Сокіл” та “Січ” від початків своєї діяльності, а згодом у відновленій формі, у міжвоєнний період ставали суттєвою підтримкою державної протипожежної оборони, з ідеологічних міркувань, особливо після початку “нацифікаційних” заходів, були обмежені у діяльності, або заборонені.

Ключові слова: протипожежний рух, сокільсько-січові організації, руханково-пожарні товариства “Сокіл”, “Січ”, “Луз”.

The Problem Statement. The reforms of enlightened absolutism and a subsequent complex of cultural, educational and social reforms of the Austro-Hungarian Empire had influence on the growth of public and apolitical activity of the Ukrainians in the 19th century. Hence, the end of the 19th century became a turning point for the development of political and national cultural institutions, including the Ukrainians in Eastern Galicia (Panfipova, 2014, pp. 123–124; Haliv, 2018, pp. 68–69).

The ideas of the Sokil movement penetrated into the territories of Eastern Galicia due to an extensive network of the Polish national and cultural societies in the second half of the 19th century, which were substantiated by the Czech figures Myroslav Tyrsh and Henryk Figner (Korolko, 2012, p. 73). The self-organization of the Ukrainian movement took place more

slowly than the Polish one, because the latter had a significantly better network of society (Papenko, 2017, pp. 76–77), while the Ukrainian public did not understand the expediency of creating such sports Sokil society: “Our citizens of that time were offended directly, angry with the “slapped” Lavrivskyi, having heard about his activities around the foundation of the movement society, mocking his fixed idea, and taking pity on the untalented spreader of the Sokil thought. Several people asked the following questions: “Why do we need “Sokoly””? Are we the Poles or the Czechs to deal with such nonsense? What else do the Poles have, they have money, they have power, so they need “Sokoly” too!..” (Tyrsh, 1948, p. 20). The creation of firefighting societies modelled on the All-Slavic “Sokil” society was actively promoted by the public figures Volodymyr Lavrinskyi and Vasyl Nahirnyi at the end of the 1870s. It should also be noted that the local administration in Eastern Galicia consisted mainly of the Polish officials, who created systematic bureaucratic obstacles to the approval of the statutory documents of the Ukrainian societies, and despite the fact that the statute of the Ukrainian Sokil society was an almost identical translation from the Czech document, which was also used by the Polish Sokil societies (Datsiuk, 1996, p. 23).

There were held preparatory constituent meetings in Lviv in July of 1892 in order to establish the “Sokil” society. The Ukrainian public figures Vasyl Nahirnyi and Volodymyr Lavrinskyi wrote the Charter of the Ukrainian “Sokil” society, the main goal of which was to create “united Ukraine that would not be subjected to the national, political, and spiritual oppression”. The Ukrainian Sokil movement aimed to “awaken and nurture mobility, sociability, and national consciousness in citizens through physical exercise, competition, physical games, and fun, and travel” with the help of physical education, while fire-fighting activities were designed to foster “unity and obedience, endurance, and a sense of duty” (Papenko, 2015, p. 71). The broad masses of the Ukrainians were drawn to the “Sokil” education system, as they were impressed by the democratic approach and the contribution to the national self-awareness in general (Papenko, 2016, p. 422). The Ministry for Internal Affairs and the Galician Governorate approved the Charter of the Ukrainian society “Sokil” – “Fire Society “Sokil” only on July 28, 1893. The society changed its primary name in 1908 to “Gymnastics and Fire Society “Sokil””, and from June 1, 1935 – “The Ukrainian Sports Society “Sokil-Batko”” (Korolko & Bordulaniuk, 2017, p. 103).

Taking into account the growing confrontation between the Austro-Hungarian and the Russian Empires and a possible war, the issue on the role of the Ukrainian movement in a possible conflict, or even the possibility of creating the Ukrainian state on an independent basis, also appeared at the beginning of the 20th century. Therefore, the Ukrainian figures consciously began to prepare patriotic and military formations for youth, which would contribute to the Ukrainian ideas establishment and could be the basis for the future struggle for statehood (Bahan, 2023, p. 177). The further formation of the sports and fire-fighting movement in the form of Sokil-Sich societies took place in Galicia in the 1910s (Rapetskyi, 1956, pp. 11–12). The leadership of the Sich movement – the “Ukrainian Sich Union” was headed by Kyrylo Trylovskyi (a co-founder of the first “Sich” in 1990, the village of Zavallia (modern Ivano-Frankivsk region) (Yakymovych, 2012). There was the network of “Sich” and “Sokil” as the academic youth carried out significant work on the military patriotic education. According to K. Trylovsky’s project, the Galician Governorate eventually granted approval for the organisational registration of the society “The Ukrainian Sich Riflemen” on March 18, 1913, marking the third attempt at the legal registration. An eminent public figure Volodymyr Starosolskyi became the koshevyi, and Dmytro Katamai (later on –

Ivan Chmola) became the osavul (Trylovskiy, 1999, p. 57). Another rifle organization was created, which was called “Sich Riflemen II” at the beginning of 1914. According to the recollections of the contemporaries, the key difference between these groups was only that the “Sich Riflemen I” considered itself a school of officers, while the “Sich Riflemen II”, considered itself an organization of private soldiers and a revolutionary army as there were students and high school youth (led by Roman Dashkevych), (Zinkevych, 1974, p. 100). Owing to the assistance of the leadership of the “Sich Riflemen II”, there was carried out a comprehensive development of its members, in particular, they conducted military training, taught fire-fighting (Bahan, 2023, pp. 178–179). It should be noted that the network of “Sich” and “Sokil” grew, in particular, as of 1914, there were 967 “Sokil” organizations in Western Ukraine, 1056 – “Sich” (Lazarovych, 2005, pp. 51–54).

The Review of Recent Research and Publications. Taking into account a significant role of the societies in the national consciousness development of the Ukrainians, the following contemporaries studied the issue on the history of the Sokil and Sich societies formation and spread – Stepan Ripetskyi (Ripetskyi, 1956), Ivan Krypiakievych (Krypiakievych, Hnatevych & Stefaniv, 1992), Vasyl Fedorchak (Fedorchak, 1935), Ivan Boberskyi (Boberskyi, 1939) and the others). There were published publications during the time of independent Ukraine, which were mainly devoted to the Ukrainian fire-sports movement in the 19th and at the beginning of the 20th centuries. The studies by Ihor Andruhiv (Andruhiv, 1994), Bohdan Koverka should be singled out among them (Koverko, 1997, pp. 62–74). There were carried out comprehensive studies on the Sokil organizations as an important part of the Ukrainian sports and gymnastics movement by the following scholars: A. Blahitka (1996), Oksana Vatsaba (1997), Andriy Sova (Sova & Tymchak, 2017; Sova & Romaniuk, 2019, pp. 71–80; Sova, 2022, pp. 104–112); the Sich movement was studied by Mykola Huivaniuk (Huivaniuk, 2009), A. Kovalenko (Kovalenko, 1992, pp. 18–22), Ivan Homa (Homa, 2011), Mykola Lazarovych (Lazarovych, 2005). There is no comprehensive study on this issue despite the large number of studies on the Sich-Rifle movement, its work in the field of patriotic and sports education of youth, and its fire-fighting activities, with the exception of the work written by S. Popovych (Popovych, 2006).

The purpose of the research is to carry out a comprehensive analysis of the fire-fighting activities of the Ukrainian Sich-Sokil societies after World War I under the conditions of the ban on the activities of the Sich rykhanka-fire society.

The Results of the Research. The activity of voluntary firefighting in Galicia dates back to the period of the Habsburg monarchy. In 1867, the law “On Societies” was adopted, which stipulated that public organizations are voluntary associations that do not have political goals, but are created to solve social, charitable and other tasks. The management of the National Union of Volunteer Firefighters (KSDP) issued the resolution in 1901 on the regulation of relations between the professional and voluntary fire departments. However, the volunteer firefighters were responsible for providing assistance, because these settlements were unable to maintain a paid fire service in small cities and towns. Modernization processes contributed to urbanization. Taking into consideration the growth in the number of cities, the number of fires also increased, so the issue on standardizing existing legislative norms regarding fire safety became urgent. Due to insufficient funding and a small number of firefighters, the Regional Department (the executive body of the Galician Regional Diet) obliged the communities of cities and towns to establish voluntary fire brigades. It was stated in the circular of the Galician Governor on February 15, 1904, as well as the “Agreement on the Patronage of the Social Democratic Party of Ukraine over Voluntary Fire Brigades”, issued by the Galician Governorate on July 23, 1904 (Hontar, 2015, pp. 347–348). In 1911, the

regional branch in Lviv regulated the organization of fire protection partially. A circular to the powiat (county) branches declared that “the voluntary fire protection in cities and towns, which performs the duties of the commune fire service, is obliged to constantly... provide fire service” (Przewodnik Pozarniczy, 1911, pp. 54–57).

The Ukrainian scholar Natalia Vovchasta, who studies the formation of firefighting movement in Western Ukrainian territories, noted that after the restoration of independence, the Polish state had limited institutional and financial capabilities to organize a firefighting service. In parallel with the state institutions that ensured fire safety, at the request of the Ministry for Internal Affairs in 1921, the “Florian Union” (founded in 1916) was reformatted into the “Union of Fire Protection of the Polish Commonwealth” (Vovchasta, 2012, p. 41). According to a scholar Zoriana Hontar the legislative framework for fire protection remained imperfect during the interwar period. After all, initially its basis was legislative acts that were adopted before the legislative formalization of the independence of the Polish Republic, or temporary laws of 1919 – 1920. This imperfect legislation reduced the effectiveness of the fire protection greatly, did not take into account the peculiarities of the region. There were partial improvements, which occurred only in 1934 – on March 13, the Sejm adopted the law “On Protection from Fires and Other Natural Disasters”, which entered into force on November 18 (Ustawa o ochronie przed pozarami i innymi klęskami, 1934).

World War I and later on the Polish-Ukrainian War made significant adjustments to the activities of the Ukrainian national cultural societies. A significant part of the figures from their ranks joined the armed struggle in the interests of the Ukrainian state – they joined the Legion of Ukrainian Sich Riflemen, and later on also the Ukrainian Galician Army. The order was issued by Ivan Boberskyi, the head of “Sokil-Batka” and a member of the Ukrainian Combat Board, which was called “To all branches of “Sich” and “Sokil”” with an appeal to join the Legion of the USS (Hayduchok, 1996, p. 90). There were more than 25 thousand members of the youth associations from Western Ukrainian territories, who responded to this call (Ripetskyi, 1956, p. 76).

The Polish administration establishment occurred in Galicia in the 1920s, despite the challenges and obstacles from the authorities, there was a gradual restoration of the organizational and practical activities of the Sokil-Sich societies, among which fire protection occupied an important place.

The former leaders of the “Sokil” decided to restore the society. The first meeting was held in Lviv on November 10, 1920, as a result, a lawyer and public figure Stepan Shukhevych as the Chairman was elected, and later on – Mykhailo Voloshyn. On April 23, 1923, the general meeting of the society was held and the head was Myron Zayachkivskyi, hence, and a new leadership was elected. The above-mentioned meeting gave impetus to the further restoration of the societies network, in general, according to the calculations of a scholar Yevhen Papenko, in 1922 – 1923, the Foreman held 37 meetings, at which 486 issues were resolved, 276 new members were accepted. In 1926, a new Charter of the society was approved, in which the main emphasis was placed on the fire and rukhanka activity of the society, so that it would be approved by the Polish authorities (officially approved on November 1, 1927) (Papenko, 2017, pp. 141–149).

The activities of the “Firefighters Section” were extremely important for the expansion of the societies network. The “Firefighters Section” of the “Sokil-Batko” organized the first post-war fire-fighting course for the Ukrainians, residents of Galicia already on May 9–14, 1922. The programme for this event was prepared by a public figure Stepan Haiduchok: he divided it into two parts – the theoretical part and practical part. There were lectures conducted and practical classes in firefighting. At the same time, the programme included issues on the “organizational state, tasks, goals and ideology of the Ukrainian Sokil organization”. The

activities of the Ukrainian Sokil societies were prohibited during the period of a significant growth of the national consciousness and at the beginning of the pacification reforms in 1930. The Polish administration prohibited the approval of the statutory documents of the Ukrainian Sokil and Luh societies, which operated on the basis of fire-fighting principles from 1935. The decision was dictated by the law on the “Union of Fire Guards” adopted by the Ministry for Internal Affairs on January 14, 1935. As a result, at the end of 1935, only 182 Sokil societies cells remained in Galicia, compared to 586 in 1929 (Papenko, 2017, pp. 154–155).

In the summer of 1921, the OSS activists, among whom Roman Dashkevych played an active role, held a general meeting in the premises of the “Zoria” society, which put forward the idea to restore the “Povitova Sich”. On January 22, 1922, the General Meeting of Lviv “Povitovaya Sich” was held in Lviv with the participation of 50 pre-war Sich activists. During the General Meeting, a new leadership of the society was approved: the Koshevyi – Roman Dashkevych, the Osaul – Yuriy Otmarshtayn; the clerk – M. Marenin (Bahan, 2024, pp. 119–120). The last step in the organizational restoration of the “Sich” was the massive fire-fighting courses, held in the spring of 1922 in the “Sokil-Batka” hall (Kyrychuk, 1993, p. 42). The first powiat Sich holiday took place in June of 1922, which aroused interest in society. Owing to R. Dashkevych’s assistance, the “Sich Visti” was restored – the printed organ of the society (Nahirniak, 2016, p. 120). The first issue of the periodical outlined the ideological direction of the society and its areas of activity: The “Sich Visti” is a completely non-party organisation, which is not associated with the party programme of a political party or any political and social grouping. Our main call is: to foster a healthy spirit among the younger generation of the nation, to develop and spread education, to organize Sich gymnastic and firefighting societies, to provide assistance in case of fires, and further – to awaken admiration for physical exercises and athletic games, and to support sociable life, discipline and discipline” (Nashi zavdannia, 1922). The editorial office also posted calls for the resumption of work (Do pratsi, Vidnovluyte Sichi, 1922, pp. 2–4), and R. Dashkevych published the article “How to Restore Sich Societies” with specific instructions (Dashkevych, 1922, pp. 4–6; Bahan, 2024, p. 122).

The issue on the fire protection was raised in the next second issue of the “Sichovi Visti”. It is emphasized in the extensive article “How to Protect yourself from Fire? Sichovyky are Fire Watchmen” that the danger of fire increases closer to summer period, in particular due to the preoccupation of the peasants and due to thatched roofing material. The importance of preventive measures was noted – the formation of “...a ready organization, whose civic duty would be to rush to the aid of a burning building so that the fire in it would end and not spread further”. The gymnastics and fire society “Sich” was that type of organization, which helped, hence, young people should join its ranks. It was also noted that for the effective operation of the new “Sich” its main task in the field is the purchase of “sykavka” (fire pumps), constant training with them, or, in the absence of “sykavka”, the Sichovyky should practise with “konovka” (buckets). Attention was drawn to the importance of having special equipment in each cell of the society two or three two-wheeled barrels in order to deliver water in time; tools that are needed for dismantling, clearing the area from burning buildings and trees (Yak okhronyty sebe pered pozharom, 1922, pp. 10–11).

The administrative and political leadership of Warsaw averted the spread of the revived “Sich Gymnastics and Fire Society” in Eastern Galicia, as it decided to consider these “Sich” organizations to be invalid due to the formal absence of the societies approved statutes. Despite the ban, the Powiat Sich submitted the statutory societies for consideration by the administration on the behalf of several villages. However, due to the military nature of the offered formation, the authorities refused registration, and certain adjustments to the statutes

did not help. The last Sich holiday took place in June of 1923, and the rukhanka and vocal event in the winter of 1923 (Nahirmiak, 2016, p. 128).

In the autumn of 1925, the “Sich” district association, at the active insistence of R. Dashkevych, again submitted to the local authorities in Galicia three draft statutes of motor and fire companies – “Sich”, “Luh”, “Bratstvo” (Svarnyk & Feloniuk, 2009, p. 325; Bahan & Stetsiv, 2022, p. 146). Lviv Voivode approved the statute only of the “Luh” company in the village of Pidberizki, Lviv voivodeship. There developed a network of “Luh” companies in 1925, in particular, according to the scholar A. Bahan, more than 200 companies appeared in the villages of Galicia during the specified period, and in 1926 – 600 (Shumskyi, 2004, p. 148; Bahan, 2023, p. 195).

The “Luh” Sports and Fire Society carried the traditions of the “Sich”. It was a sports and fire-fighting society officially, but it was a patriotic and educational centre for the young people mainly, who were being prepared for the future struggle regarding the Ukrainian statehood (Krezubskyi, 2020, p. 64). The structure of the new society had a three-tiered form, the main leadership operated in Lviv, there were also district “Luh” and societies in the fields. The “Luh” society followed a paramilitary structure in terms of its ideological and structural orientation, as it conducted shooting and military training for its personnel (Shumskyi, 2004, p. 150).

R. Dashkevych devoted an important place to the statutory design of the “rukhanka society and fire watch “Lug””, which had the following goals: “I. Humanitarian: 1. Providing assistance in case of fires; 2. providing assistance in case of floods; II. Cultural and educational: 1. Spreading enlightenment among members; 2. Spreading love of exercises and sports games; 3. Maintaining social life”. The fire appliances were purchased and maintained in order to achieve the outlined goals, as well as means for rescuing people in case of floods; the society members were taught to use them, practical training was conducted in extinguishing fires, localizing fires, and rescuing in case of floods; public lectures, concerts, courses for the illiterate were organized; reading rooms were maintained, etc. (Bahan, 2024, pp. 126–127).

There were held “Fire and rukhanka” courses and “Luh” festivals, similarly to those in the Sich centres for the practical training of personnel mainly. The courses usually followed the following programme: 1) firefighting theory; 2) exercises with a fire pump; 3) rukhanka exercises; 4) how to conduct work in the society. The cultural and educational programme was an integral part of the courses, in particular, the essays presentation on the Ukrainian history. At the same time, the leadership of the “Luh” society always noted that, in addition to teaching rukhanka exercises and firefighting, the society also has “great cultural, educational and pedagogical tasks” (Vynnychuk, 1999, p. 187).

It should be noted that during the second half of the 1920s, the “Luh” society network expanded actively, despite the opposition of the Polish authorities, who refused to register new branches. However, in 1930 – 1932, after the “pacification actions,” a large number of organizations virtually ceased to exist (Fedorchak, 1935, p. 10). According to a scholar Oleh Vynnychuk, 600 societies were liquidated in 1930 – 1932, and about 500 remained active. It should be also noted that there were negotiations between the “Luh” leadership and the Ministry for Internal Affairs regarding the further format of the society existence in 1932. The authorities declared that the organization could not exist in the same form as it had existed until that time, so “either it would change its Charter to a physical education and sports society and would be subject to the Government of Physical Education and Military Training,” or it would become a purely fire-fighting society. After discussions, the society’s leadership chose a “physical education and sports” direction, and so it officially received the name “Ukrainian Physical Education and Sports Society “Luh”” (Vynnychuk, 1999, p. 190).

The Conclusions. The interwar period of the 20th century became the period of significant challenges for the Ukrainians of Eastern Galicia, caused by geopolitical changes after World War I and the defeat of the liberation struggle in Naddnpiarianshchyna, the Polish-Ukrainian War. There was a restoration and partly reorientation of the methods that encouraged the civil society to take active actions aimed at protecting their national interests under the conditions of the introduction of Polish power in the region. The sports and firefighting societies played an important role in the work of building the national self-determination, patriotic education of the youth. Despite the bureaucratic, institutional, and later on the political opposition of the Polish administration, the “Sich-Sokil” societies restored the network of their societies gradually at the beginning of the 1920s. Despite the de facto ban on the “Sich” movement and firefighting societies, a new organization with a similar ideology was created – “Luh”. The most significant challenge for the activities of the national cultural societies, including sports and firefighting societies, was a complex of “pacification” measures, which ultimately significantly reduced their number and activity of figures. Taking into account the conditions of an imperfect legislative framework and permanent financial problems, the issue on ensuring fire protection not only in cities but also in small settlements was acute. The activity of voluntary fire brigades operating within the fire-fighting and gymnastics societies demonstrated their high efficiency in ensuring fire safety. The “Sich”, “Sokil”, and later “Luh” societies became important centres for teaching not only theory, but also practical methods of fighting fire and eliminating the consequences of fires. The “Fire-rukhanka” courses, Sich and Luh holidays were held mainly for the purpose of the national and patriotic education and at the same time for training personnel.

Acknowledgements. We express sincere gratitude to all members of the editorial board for consultations provided during the preparation of the article for publishing.

Funding. The authors received no financial support for the research, authorship, and/or publication of this article.

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*The article was received February 11, 2024.
Article recommended for publishing 29/11/2024.*

UDC 94(477.8)“1929/...”(092):[329.73(477:100)]
DOI 10.24919/2519-058X.33.317481

Ivan KHOMA

PhD (History), Head of the Department of History, Museum Studies and Cultural Heritage, Lviv Polytechnic National University, 12 Stepana Bandery Street, Lviv, Ukraine, postal code 79000 (ivan.y.khoma@lpnu.ua)

ORCID: 0000-0003-4607-7065

ResearcherID: J-4139-2018

Mykola POSIVNYCH

PhD (History), Senior Researcher of the I. Krypyakevych Institute of Ukrainian Studies, National Academy of Sciences of Ukraine, 4 Kozelnytska Street, Lviv, Ukraine, postal code 79026 (posiv@yahoo.com)

ORCID: 0000-0001-5555-0753

Іван ХОМА

кандидат історичних наук, доцент, завідувач кафедри історії, музеєзнавства та культурної спадщини, Національний університет “Львівська політехніка”, вул. С. Бандери, 12, м. Львів, Україна, індекс 79000, (ivan.y.khoma@lpnu.ua)

Микола ПОСІВНИЧ

кандидат історичних наук, старший науковий співробітник Інституту українознавства ім. І. Крип'якевича, Національна академія наук України, вул. Козельницька, 4, м. Львів, Україна, індекс 79026 (posiv@yahoo.com)

Bibliographic Description of the Article: Khoma, I., & Posivnych, M. (2024). Yevhen Konovalets and international activity of the Organization of Ukrainian Nationalists. *Skhidnoievropeiskiy istorychnyi visnyk [East European Historical Bulletin]*, 33, 149–165. doi: 10.24919/2519-058X.33.317481

YEVHEN KONOVALETS AND INTERNATIONAL ACTIVITIES OF THE ORGANIZATION OF UKRAINIAN NATIONALISTS

Abstract. *The purpose of the research* is to study the formation, directions and results of the international activities of the Organization of Ukrainian Nationalists under the leadership of Ye. Konovalets in 1929 – 1938. *The research methodology* is based on the principles of historicism, general scientific methods of generalization and typology, as well as special scientific research methods: comparative historical, historical systemic and critical analysis of sources. **The Scientific Novelty.** *On the basis of a rich source material, the major part of which is introduced into a scientific circulation for the first time, the following issues have been elucidated: development and challenges during of international activities implementation; directions and result of international activity.* **The Conclusions.** *Therefore, the international activity of Ye. Konovalets and the OUN can be divided into two periods. The first one is 1929 – 1934. During this period, there was an attempt to define conceptual issues of international politics. However, due to the lack of experience in international activities, a sufficient number of specialists and the dynamics of international processes, this was not*

done. In the process of discussing foreign policy, there was an initiative to unify with other stateless peoples of the former Russian Empire. Due to the lack of specialists and weakness of other national movements, this was not implemented. Instead, in 1930 – 1933, they launched international activities within the framework of the League of Nations successfully. Several times the Ukrainian issue became the subject of consideration in this global international institution. It mainly concerned the life of the Ukrainians in Galicia under the Polish occupation. Trying to convey the truth about the life of the Ukrainians in Poland, it was possible to establish diplomatic relations with Italy, Japan and England, which were engaged in the Ukrainian issue. Diplomatic relations were especially close with Italy, which was considered a kind of lawyer, both in the League of Nations and Germany. At the same time, Ye. Konovalets had no hope for Germany led by A. Hitler in support of the revival of the Ukrainian state. Instead, Germany and Japan were considered the strongest of those capable of breaking the borders formed after World War I. The OUN planned to use the situation in its favour: The second stage of international activity under Ye. Konovalets began in 1937. A kind of pause in international activity, lasting almost for three years, was connected with the murder of the Minister for Internal Affairs B. Pieratski by a member of the OUN in Warsaw. After that, Poland succeeded in getting the activities of the OUN branches in Czechoslovakia, Germany and Lithuania to be limited for a certain time. However, when it became clear that Germany's ambitions in the redistribution of Europe could not be put to rest, Ye. Konovalets and the PUN resumed international activities, especially with Japan. There was hope that this state would start a war with the USSR. Although joint actions with Japan were not agreed upon. In the end, we should state that Ye. Konovalets and the OUN in general in their international combinations did not develop relations with the USA.

Key words: Yevhen Konovalets, Yevhen Onatsky, Dmytro Andriyevsky, Rico Yariy, Stepan Bandera, the Organization of Ukrainian Nationalists, League of Nations.

ЄВГЕН КОНОВАЛЕЦЬ ТА МІЖНАРОДНА ДІЯЛЬНІСТЬ ОРГАНІЗАЦІЇ УКРАЇНСЬКИХ НАЦІОНАЛІСТІВ

Анотація. *Мета роботи* – дослідити формування, напрями та результати міжнародної діяльності Організації українських націоналістів (ОУН) під керівництвом Євгена Коновальця. **Методологія дослідження** базується на принципах історизму, загальнонаукових методах узагальнення і типологізації, а також спеціально-наукових методах дослідження: порівняльно-історичному, історико-системному та критичному аналізі джерел. **Наукова новизна.** На основі багатого джерельного матеріалу, більшість з якого вперше вводиться до наукового обігу, розкрито: розбудову і виклики під час реалізації міжнародної діяльності; напрями та результат міжнародної діяльності. **Висновки:** Отже, міжнародну діяльність Є. Коновальця та ОУН можна поділити на два періоди. Перший – 1929 – 1934 рр., коли була здійснена спроба визначити концептуальні питання міжнародної політики. Однак через відсутність досвіду міжнародної діяльності, достатньої кількості фахівців і динаміку міжнародних процесів цього не було зроблено. У процесі обговорення зовнішньої політики виникла ініціатива об'єднання з іншими бездержавними народами колишньої Російської імперії. Ця ініціатива не була реалізована. У 1930 – 1933 рр. вдалося розгорнути міжнародну діяльність у рамках Ліги Націй. Намагаючись донести правду про життя українців у Польщі, вдалося встановити дипломатичні відносини з Італією, Японією та Англією, які займалися розслідуванням української справи. Особливо тісні дипломатичні відносини склалися з Італією. Щодо Німеччини, то Є. Коновалець не покладав на неї надії у підтримці відродження Української держави. Другий етап міжнародної діяльності за Є. Коновальця розпочався в 1937 р. Своєрідна пауза в міжнародній діяльності, тривалістю майже три роки, пов'язана із вбивством членом ОУН у Варшаві міністра внутрішніх справ Б. Перацького. Після цього Польщі вдалося добитись, щоб на певний час було обмежено діяльність осередків ОУН у Чехословаччині, Німеччині та Литві. Однак коли стало зрозумілим, що амбіції Німеччини у перерозподілі Європи не вдасться приспати нікому, Є. Коновалець та ПУН відновили міжнародну діяльність, особливо з Японією. Була надія, що ця держава почне війну з СРСР. До узгодження спільних дій з Японією таки не дійшло. Насамкінець доводиться констатувати, що Є. Коновалець та ОУН загалом у своїх міжнародних комбінаціях не розвинули відносини з США.

Ключові слова: Євген Коновалець, Євген Онацький, Дмитро Андрієвський, Ріко Ярій, Степан Бандера, Організація українських націоналістів, Ліга Націй.

The Problem Statement. On January 27 – February 3, 1929, the Congress of Ukrainian Nationalists was held in Vienna. As a result, the Organization of Ukrainian Nationalists (OUN) was established. It can be argued that from the defeat of the First National Liberation Struggle in 1921 until World War II, it was the only successful event that brought together 32 representatives of various Ukrainian nationalist forces and ended with the creation of a new national military political force. With the creation of the OUN, systematic work on preparations for the revival of Ukrainian statehood began. Objectively, as of 1929, the only one who could organize such an event was Yevhen Konovalts, the former leader of the Ukrainian youth movement of Galicia, the commander of the military formation of the Sich riflemen, the colonel of the UNR Army and the head of the Ukrainian military organization. In addition, he managed to develop the OUN into the strongest revolutionary Ukrainian military political force.

At the time of the OUN formation, the Movement of Ukrainian Nationalists (PUN) understood that a change in the international political situation was a necessary prerequisite for the restoration of independent Ukraine. That is why, the Ukrainian nationalists focused on the states that sought to revise the Versailles-Washington system of peace treaties and directed their activities against the USSR and Poland. Germany, Italy and Japan were the states that were interested in changing the borders, and also had the power to do it. The focus, especially on Germany and Japan, was balanced sufficiently. In the general provisions adopted by the Congress, it was noted that the OUN did not recognize international acts that enshrined enslavement of Ukraine.

Lithuania became the key international partner for the OUN, which was not satisfied with its borders either, and there was also a threat of occupation by Poland or the USSR. For the support of Ukrainian nationalists, Lithuania received from them informational and analytical data about international processes in Europe. Also, on the international arena, the Ukrainian national forces were heard more strongly, talking about repression, assimilation, etc. in Poland and the USSR. Criticism of these states was beneficial to Lithuania, and in the event of a new war, the Lithuanians expected to restore their ethnic borders.

For several years, the League of Nations played an important role in the international activities of the OUN. This international global organization sought to show the life of a stateless nation under occupation. In this way, they tried to gain favour for the Ukrainians of other countries, in particular England.

The Analysis of Recent Research and Publications. In modern historiography, the role of Ye. Konovalts in the international activities of the OUN has not become the subject of a comprehensive study. Fragmentary the study of this issue is determined by several scientific publications. The author of the first one is M. Havryshko (Havryshko, 2014, pp. 174–201). This is a complex scientific article based on little-known or unknown source material. It concerns the international activities of the OUN during and after the Polish policy of appeasement of the Ukrainian population of Galicia, which is better known as “pacification”. That is, how the leadership of the OUN worked so that these repressive actions of the Polish security authorities became known in Europe in the autumn of 1930. The author of the second article is M. Posivnych. Basically, it is the article about the theoretical aspects of the OUN foreign policy. Practical aspects or foreign policy activities concern the years of 1937 – 1939 (Posivnych, 2018, pp. 87–122). In the collective article by R. Demchyshak and T. Starodub there are discussed the theoretical aspects of the international policy of Ukrainian national forces in the publications of the Ukrainian nationalists (Demchyshak & Starodub, 2021, pp. 104–115).

The current state of historiography is defined by the publication on the search of a foreign policy concept by D. Andriyevsky, who was one of the founders of the OUN (Starodub, 2019, pp. 50–56). Some aspects of the foreign policy activities of the Ukrainian Liberation Movement structures are analyzed in the article by Vasyl Ilnytskyi, Vitaliy Telvak, Mykola Haliv (Ilnytskyi & Telvak, 2018; Ilnytskyi & Haliv, 2020). However, each of these publications is devoid of international activity practical measures, which the OUN managed under the leadership of Ye. Konovalets.

A number of recent publications about the OUN and the environment for preserving unpublished materials of this organization caused theoretical interest (Sych, 2024, pp. 111–120; Slobodianiuk, 2023, pp. 235–252; Antoniuk & Trofymovych, 2021, pp. 116–126; Khoma, Vovk, Holoshchuk & Muravska, 2023, pp. 299–311).

The purpose of the research is to study the formation, directions and results of the international activities of the Organization of Ukrainian Nationalists under the leadership of Ye. Konovalets in 1929 – 1938.

The Results of the Research. For the first time, after the establishment of the OUN, international activities and the development of international policy were discussed in Prague at the meeting of the PUN on October 9–11, 1929. Ye. Konovalets, D. Andriyevsky, M. Sciborsky, D. Demchuk, L. Kostariv, M. Kapustiansky, M. Kushnir and the others were present at the meeting (Cherchenko & Kucheruk, 2005, pp. 209–210).

Two weeks later, D. Andriyevsky summarized the work of the meeting and presented it to Ye. Konovalets. He suggested several directions in the international policy of the OUN. In particular, to establish communication with the head of the public organization of the Pan-European Union, Richard Kudenhofe-Kalerghi, in order to introduce him to the Ukrainian issue. He believed that the OUN should promote the Ukrainian issue in the League of Nations. He recommended forming clubs at the OUN branches in Europe that would unite the Belarusians, the Georgians, the Lithuanians, the Latvians, the Kubantsi and the Dontsi. In his opinion, in the future it would be necessary to initiate the establishment of the League of Nations of Eastern Europe. In this way, it would be possible to fight for national rights in the League of Nations (Letter from D. Andriyevsky to E. Konovalets dated October 27, 1929. Oseredok. Mykhailo Seleshko Collections. Folder D. Andriyevsky. Box 12 (b), Ea 4–7, there is no numbering of documents and pages).

Ye. Konovalets sent D. Andriyevsky's letter of October 27 to M. Sciborsky, M. Kushnir and V. Martyntsev. Everyone treated positively these initiatives and looked forward to the completion of work on the concept of international policy of the OUN. As for the Ukrainian issues that need to be resolved in the League of Nations, Ye. Konovalets believed that it would be possible to start this work when he moved to Geneva (Letter from E. Konovalets to D. Andriyevsky dated November 22, 1929. Oseredok. Mykhailo Seleshko Collections. D. Andriyevsky folder. Box 12 (b), Ea 4–7, there is no numbering of documents and pages).

In continuation of the issue about the enslaved peoples of Eastern Europe, M. Kushnir (a pseudonym V. Bohush) devoted the article “League for the Liberation of the Peoples of Eastern Europe, the Caucasus and Transcaspia”, and subsequently several more publications. M. Kushnir tried to form the concept of a joint liberation struggle of enslaved nations. This joint effort would demonstrate that the struggle for state independence is the problem of Eastern Europe, and not only of the Ukrainians. Further, in his opinion, only the division of the USSR into national states and the creation of independent Ukraine (within their ethnic boundaries) in Eastern Europe will balance political and economic processes, as

well as contribute to the reduction of the Russian hegemony (Bogush, 1929, pp. 392–396; Dniprotskyi, 1930, pp. 12–18; Dub, 1933, pp. 109–114).

At the beginning of January of 1930, Ye. Konovalets gave recommendations to D. Andriyevsky in preparing the concept of the OUN foreign policy. In particular, he asked to distinguish between internal and external policy in the work on the concept of foreign policy. In his opinion, the main goal in domestic policy is to become an influential independent and self-sufficient Ukrainian political unit. On this path, the principles are constant, and the tactics are variable. As for foreign policy, he emphasized that the positions of the OUN had not been clarified. This process required time, experience, sufficient professional personnel, etc. Because what all the Ukrainian centres in emigration did could hardly be called foreign policy, it was rather propaganda of the Ukrainian issue in the world (Letter from E. Konovalets to D. Andriyevsky dated January 4, 1930. Oseredok. Mykhailo Seleshko Collections. D. Andriyevsky folder. Box 12 (b), Ea 4–7, there is no numbering of documents and pages).

Ye. Konovalets asked not to worry about the threat of Ukrainian political centres, but to concentrate on forming the strong OUN. Only after that, it will be possible to enter into relations with all those centres and dictate one's vision of the development of political processes. Instead, at the formation stage, it is necessary to continue to act independently, not to interfere in conflicts, but if possible to correct initiatives. As an example, there was S. Shulhin's initiative formulated at the League of Nations, which was amended by the Ukrainian community in Prague, which included members of the OUN. As for S. Shulhin's initiatives, it was about the Nansen Committee at the League of Nations. This committee was responsible for issuing Nansen Passports to stateless people. It was problematic for the Ukrainians, because those who came from the former Russian Empire were given passports as if they were the Russians. The task of Ukrainian representatives was to try to ensure that the Ukrainian nationality was indicated in Nansen passports. In this regard, Ye. Konovalets recommended, if necessary, to support the entry of S. Shulhin or M. Halahan, who headed the Ukrainian community in Prague, into the Nansen Committee (Letter from E. Konovalets to D. Andriyevsky dated January 21, 1930. Oseredok. Mykhailo Seleshko Collections. D. Andriyevsky's folder. Box 12 (b), Ea 4–7, there is no numbering of documents and pages).

Later, Ye. Konovalets instructed D. Andriyevsky to deal with this issue. As a result, he managed to join the Nansen Committee (Onatsky, 1954, p. 334).

In general, D. Andriyevsky, M. Kushnir or someone else from the PUN did not develop some coherent conceptual document on the international policy of the OUN. Work on this issue was reduced to international analytics (Yary, 1930, pp. 215–220; Dub, 1933, pp. 109–114). In particular, D. Andriyevsky considered Germany, Italy, Japan, England and the USA to be countries that seek to use the Ukrainian issue on the international arena in their own interests. Therefore, it is necessary to take maximum advantage of the contradictions between the above-mentioned states for the needs of the liberation movement (Andriyevsky, 1931, pp. 257–265).

At the beginning of March of 1930, Ye. Konovalets moved to Geneva, which contributed to the revival of international activity for a certain time (Letter from E. Konovalets to D. Andriyevsky dated March 7, 1930. Oseredok. Mykhailo Seleshko Collection. D. Andriyevsky's folder. Box 12 (b), Ea 4–7, there is no numbering of documents and pages). By the way, Ye. Konovalets was in Geneva as a Lithuanian journalist and a citizen of Lithuania (Lithuanian journalist's ID card in the name of Yevhen Konovalets, issued in 1929. Oseredok. Yevhen Konovalets Fund No. 307. Folder 19. Part 62/1).

In the spring of 1930, the expansion of the area of the OUN activity to Italy and the establishment of contacts with the political circles of this country were started. Ye. Konovalts connected the implementation of this idea with Ye. Onatsky. On March 17, 1930, he wrote a letter to Ye. Onatsky, asking him to find a day or two to meet. Ye. Onatsky agreed to meet at a convenient time (Onatsky, 1954, p. 143).

On May 24, at 9 o'clock in the morning, Ye. Konovalts arrived in Rome. After visiting Ye. Onatsky's apartment and getting to know his wife Nina, they went for a walk in Villa-Borghese Park. Ye. Konovalts said that he planned to hold the PUN conference in Geneva in June. He invited Ye. Onatsky to be present. Ye. Onatsky replied that he probably would not be able to, because he did not have any passport and money. Ye. Konovalts promised to help with the Lithuanian passport owing to S. Lazoraitis the diplomatic representative at the Vatican, and the OUN would pay for the trip (Onatsky, 1954, p. 233).

The meeting to which Ye. Konovalts invited Ye. Onatsky was held in Geneva on July 5–6, 1930. It was attended by Ye. Konovalts, D. Andriyevsky, Ye. Onatsky, V. Bohush and O. Boikiv. At this meeting, it was stated one more time that there was a lack of professionals for the development of domestic and foreign political activities. If you choose a priority between domestic and foreign policy, you should give preference to domestic policy. It is necessary to unite the emigration forces and form a broad Ukrainian representation in the world (Onatsky, 1954, pp. 301, 305, 310, 315–317).

The pacification and killing of Yu. Holovinsky, the head of the Regional Executive of the Ukrainian Military Academy, by the Polish police on September 30, 1930 led to the deployment of a powerful information campaign by the PUN on the international stage about the terror against the Ukrainians in Galicia. For this information campaign, the OUN used the network of its representative offices in Europe, as well as contacts with various other Ukrainian cultural and educational organizations.

The main goal for the PUN was the League of Nations. It was the centre where the main flow of complaints, protests, appeals, etc. was sent. The organizational reference office of the PUN sent the informational message "Circular" to the leaders, secretaries and departments of the OUN, so that they would send telegrammes to the League of Nations and the governments of the countries where they were, protesting against the Polish terror in Galicia. It was necessary to convey the necessary amount of information in order to draw attention to the events in Poland against the Ukrainians (Bulletin for the attention of leaders, secretaries of the OUN and department boards. Oseredok. Mykhailo Seleshko Collections. Medal's list. Box 12 (b), Ea 4–7, there is no numbering of documents and pages).

In the fund of Ye. Konovalts there are three passes in his name and surname for visiting the XI session of the League of Nations, which took place from September 10 to October 4, 1930. The first two passes for a morning visit on September 15, and the second one – for September 16, without specifying the time of visit (Pass to attend the meeting of the XI Assembly of the League of Nations, September 15, 1930. Oseredok. Yevhen Konovalts Fund No. 307. Folder 1/6; Pass to attend the meeting of the XI Assembly of the League of Nations, September 16, 1930. Oseredok. Yevhen Konovalts Fund No. 307. Folder 1/7). I think that the second pass for September 15, which differs only in a seat in the hall (on the first one – No. 244, and on the second one – No. 246), was for his wife Olha, who acted as a translator from the French language. Actually, O. Boikiv mentions it about Olha. Ye. Konovalts was invited by the Minister for Foreign Affairs of Lithuania Dovas Zaunius to take part in the meeting of the League of Nations (Boykiv, 2021, pp. 710–711).

Ye. Onatsky was involved in the distribution and production of information about events in Galicia. In particular, on October 8 he published the article “Polish Policy in Eastern Galicia” in the newspaper “Il lavoro fascista”, and on October 27 he sent an informational telegramme to the Pope (Onatsky, 1954, pp. 388–390, 408).

Ye. Konovalets considered the work of the OUN to be positive in the direction of informing Western Europe about the Polish terror in Western Ukraine. Moreover, he asked the editorial offices of newspapers that were not indifferent to the Ukrainian issue to write letters of gratitude, and also reminded of gratitude to the British ambassador Melon (Bulletin of the Main Office of the Ukrainian Nationalists’ Party, December 1, 1930, Oseredok. Mykhailo Seleshko Collections. Folder 1929. Medal’s list. Box 12 (b), Ea 4-7, there is no numbering of documents and pages).

In the last issue of “Building the Nation” for 1930, all information was collected about the protests of the Ukrainians in various countries of the world against “pacification”, complaints sent to foreign governments, articles, notes, reviews, etc. in the foreign and Ukrainian press (Khronika podiy, 1930, pp. 292–315). As M. Seleshko wrote, as of December 17, 1930, the League of Nations received about 600 protests sent by the Ukrainians (Cherchenko, 2010, p. 21).

On January 19, 1931, the XI session of the Assembly of the League of Nations began in Geneva. Out of hundreds of Ukrainian appeals, only three were taken into account. Among them, the petitions of the Ukrainian community from Omenankuri (France), the English deputies from London and the Ukrainian parliamentary representation. According to Ye. Onatsky, the petition of 65 members of the English Parliament strengthened the hope that the Ukrainian issue would not be ignored. In addition, Germany spoke against Poland’s policy towards national minorities at this session. Germany was concerned about the life of the Germans in Upper Silesia. To make this issue crucial, the German representative also mentioned the Ukrainian issue. As a result, the Ukrainian issue was not ignored. It was handed over to the “Committee of Three” formed at the session for study. Its members included Norwegian Prime Minister and Foreign Minister Johan Ludwig Mowinkel, Italian diplomat and lawyer Massimo Pilotti and British Foreign Secretary Arthur Henderson (Onatsky, 1981, pp. 16–18; Mirchuk, 2007, p. 204; Havryshko, 2014, pp. 191–192).

After a temporary rise, a new stage of work began, which consisted in an effort to establish contacts with the representatives of the committee and convey information about pacification to them. On February 13, Ye. Konovalets asked Ye. Onatsky to write, by the help of the bishop of the UGCC Ivan Buchko, an appeal to the bishops of the Church of England, so that they would support efforts to punish Poland at the international stage for terror against the Ukrainians in Galicia. In addition, Ye. Onatsky entered into communication with M. Pilotti. He reported on the background of the conflict between the Ukrainians and the Poles, attempts at reconciliation in 1920, etc. Ye. Onatsky also informed Italian journalists about the Ukrainians (Onatsky, 1981, pp. 26–27).

In the first decade of March of 1931, Ye. Konovalets visited Paris and Brussels, where the PUN members M. Sciborsky and D. Andriyevsky lived. The main issue he focused on was the Ukrainian issue in the “Committee of Three”. In various ways he tried to reach the representatives of England and Italy so that they would understand the problem and take the side of the Ukrainians. The leadership of the OUN wanted to inflict a diplomatic defeat on Poland in this issue. In Rome, Ye. Onatsky conducted a very complex communication with various government circles in Italy. He received support, sympathy, admiration for the appearance of the Ukrainian issue in the League of Nations, but they made it clear that the initiative in this issue belonged to the British (Onatsky, 1981, pp. 39–42).

In Geneva, Ye. Konovalets consulted with the Englishwoman Mary Shypshanks on whether it was possible to expect the English diplomats to side with the Ukrainians. Previously, M. Shypshanks did a lot to draw attention to the Ukrainian issue in the League of Nations and other international organizations. In particular, she was acquainted with M. Rudnytska and in November of 1930 she visited Galicia. There she learned about real Ukrainian-Polish social and political relations (Onatsky, 1981, pp. 13–15). Ye. Konovalets, M. Kushnir and M. Seleshko understood that England was interested in strong Poland as opposed to the Bolsheviks. Although a neutral position could be counted on (Cherchenko, 2010, p. 33).

A meeting of the “Committee of Three” was scheduled for May 19. The day before, V. Paneiko and M. Rudnytska arrived in Geneva. And as M. Seleshko writes, “diplomacy immediately went into motion”, namely meetings with representatives of the “Committee of Three” countries (Cherchenko, 2010, p. 38).

On May 19, the “Committee of Three” began working, and made a decision on May 23. It was a communique that ran about the importance of understanding between the Ukrainians and the Poles. Therefore, they decided to postpone consideration of this issue to a later time (Havryshko, 2014, p. 194).

Ye. Konovalets, writing to D. Andriyevsky and Ye. Onatsky regarding the communique, noted that the information provided was not final, and accordingly it might still be changed. In his opinion, it was not a defeat for the Ukrainian side. After all, the very fact that the communique did not run exclusively about “pacification” but about the Ukrainian issue in general. Among the bad signs was the fact that the committee called for negotiations between the Ukrainians and the Poles. Ye. Konovalets believed that one of the real scenarios of how the Poles would behave was that they would make demands that the Ukrainian side would not be able to comply with. Then they would inform the international community about the breakdown of negotiations or hold talks with various groups. This would lead to intrigues and quarrels between us, and the Poles will be informed that the Ukrainians do not know what they want. Therefore, obviously, the Ukrainian political forces in Galicia must be united, because they will still have to talk to the Poles. Success depends on the right tactics and unity. At the same time, it is expedient to continue to inform the international community about our problem with the Poles and to develop diplomatic contacts (Onatsky, 1981, pp. 97–98).

Ye. Konovalets focused on M. Rudnytska’s major diplomatic work and informed that she was going to go to London. There, she planned to ask English parliamentarians to continue supporting the Ukrainian issue (Onatsky, 1981, p. 99).

According to Ye. Onatsky, the communique is a compromise document, but “leans more in our direction”. In addition, on June 5, Ye. Onatsky managed to get to a meeting with M. Pilotti, who explained what the result of the committee’s work was. It is about the fact that Poland was forced to talk with the Ukrainians, try to reach an agreement, etc. (Onatsky, 1981, pp. 101, 110–111).

It is obvious that this was an international achievement of the PUN. However, it would not be worth waiting for an understanding with Poland from the regional authorities. They rejected the legal evolutionary methods of fighting Poland, because with the help of these tactics, the Ukrainian political parties and public organizations did not manage to win even autonomy for Ukraine, let alone independence (SALR, f. 121, d. 3, c. 1020, pp. 3v–4).

Imbalance in the created working atmosphere aimed at preparing for the League of Nations caused the murder of the Polish politician Tadeusz Gołowko in Truskavets on August 29, 1931. This terrorist act was organized by the combat officer of the Ukrainian Defense

Forces, R. Shukhevych, and was carried out by members of the military organization, Vasyl Bilas and Dmytro Danylyshyn. The regional leader of the OUN, Ivan Gabrusevych, agreed to the execution of the murder. Most likely, organizing the murder of T. Gołowko was not previously discussed with the leadership of the UVO and the OUN. The regional leadership of the UVO and the OUN considered Tadeusz Gołowko involved in pacification and complicit in the understanding with the Polish authorities, which was humiliating for the Ukrainians (Mirchuk, 2007, pp. 218–220).

Reacting to this event, Ye. Konovalets sent “Communiqué” to the members of the PUN on September 3, 1931, where he expressed his thoughts and recommended how foreign journalists and interested people should be informed about this event. Based on the fact that Ye. Konovalets did not know about the preparation of the murder of Tadeusz Gołowko, in the “Communiqué” he reduced the position rather to a provocation by the Poles, and maybe even by the Bolsheviks. In his opinion, provocation is indicated by the fact that the murder was carried out on the eve of the meeting of the League of Nations, at which the issue of the Polish terror against the Ukrainians was to be decided – pacification (Onatsky, 1981, pp. 193–195).

The Ukrainian deputies, politicians and journalists started coming to Geneva at the end of August. Among them, M. Rudnytska, Z. Pelensky, Ye. Onatsky, D. Andriyevsky, V. Paneiko, Ya. Makohon and the others. From the memoirs of Ye. Bachyna-Bachynsky, Ye. Konovalets held on confidently enough. Despite the fact that the Polish information campaign, especially provoked by the murder of Tadeusz Gołowko, fueled anti-Ukrainian sentiments. The Ukrainian issue was not the only one and definitely not the first priority (Bachyna-Bachynsky, 2021, p. 796).

On September 11, the Swiss newspaper “La Suisse” reprinted the article from the Polish newspaper “Kurjer illustrowany Godzienny”, in which, among other things, there was discussed the financing of the activities of Ye. Konovalets by the Germans. On the same day, the letter was written on his behalf in French to the editors of the newspaper “La Suisse”. In the letter it was stated that Ye. Konovalets was not the head of the UVO, he did not cooperate with and did not receive any funding from the Ministry for Foreign Affairs and the Ministry for Military Affairs of Germany. The appearance of these allegedly sensational falsified news appeared on the eve of the consideration of the case about the Ukrainian minority in Poland at the meeting of the League of Nations. In this way, the Polish journalists intended to discredit the Ukrainians. He writes that he will challenge the baseless accusations published in “Kurjer illustrowany Godzienny”. Finally, Ye. Konovalets requests that a rebuttal be published in the next issue (Mr. Editor-in-Chief of the newspaper “La Suisse” Switzerland. Oseredok. Yevhen Konovalets Foundation No. 307. File 10. Part 8).

On September 17, M. Rudnytska organized a meeting with Mykhailo Luchkovych, the Canadian Parliament member. Ye. Konovalets, D. Andriyevsky, Ye. Onatsky and V. Bohush were present as the members of the PUN. The arrival of M. Luchkovych is connected with the meeting of the “Committee of Three” to strengthen international support for the Ukrainians (Bachyna-Bachynsky, 2021, p. 797).

On September 18, 1931, the meeting of the “Committee of Three” was held under the chairmanship of the English representative Robert Cecil. The situation that arose due to the murder of T. Gołowko led to the postponement of consideration of the Ukrainian issue at the January session of the League of Nations (Havryshko, 2014, p. 197).

In the letter dated September 28 in Chicago to the editors of the newspaper “Ukraine”, Ye. Onatsky evaluated the postponement of this issue positively. In his opinion, this

made it possible to continue introducing the Ukrainian national issue in Poland to “wider circles of people and politicians”. Although he did not consider this issue to be promising (Onatsky, 1981, pp. 208–209).

Objectively, during the January session of the League of Nations, the informational activity of the PUN decreased greatly. It was understood that after the murder of T. Gołowko and a series of articles about the cooperation of the Ukrainian nationalists with Germany, it is difficult to find convincing arguments in the issue of pacification. In particular, the lack of convincing information material is mentioned in the letter of Ye. Konovalts to R. Yary and D. Andriyevsky dated January 13, 1932. He writes that M. Shypshanks, who in 1930 did a lot to actualize the issue of pacification, sent several letters in which she noted the lack of information for anti-Polish agitation in England. She criticized the Information Bulletin of the OUN because of the two anti-Bolshevik articles. M. Shypshanks believed that criticizing the Bolsheviks could alienate supporters of the Ukrainian issues. Ye. Konovalts noted that in his reply to M. Shypshanks he explained that the Bolsheviks also carried out anti-Ukrainian terror and therefore it is necessary to draw international attention to them. Instead, anti-Polish materials were planned to be published in another issue (Cherchenko, 2007, p. 288).

On January 19, D. Andriyevsky was refused the reception by the Japanese ambassador in Brussels, who was supposed to be a speaker at the League of Nations. He had to hand over the memorandum to the ambassador, and a copy was sent to M. Rudnytska, maybe she would be able to meet with him (Cherchenko, 2007, p. 289). In the memorandum there was discussed the importance of creating the Ukrainian state in opposition to Soviet Russia, which would constantly threaten Japan in the Far East. The first stage of the creation of such a state could be the formation of a state in the western Ukrainian lands, which would be under the protectorate of the League of Nations, not Poland (Havryshko, 2014, p. 199).

The Ukrainian issue was discussed at the League of Nations on January 29, 1932. Naotake Sato, the Japanese ambassador to Belgium, reported on this issue. Despite critical remarks towards Poland regarding pacification, the decision was made in its favour. Poland's actions were justified by the terrorist activities of the Ukrainians in the region, accusing them of trying to use the League of Nations for anti-Polish propaganda (Havryshko, 2014, p. 199).

The PUN understood this decision. In February of 1932, Ye. Onatsky summarized the struggle with Poland in the international arena in the article “On International Issues”. This is a long article, with the penultimate paragraph devoted to the January 29 meeting. The author considers the very fact of this issue in the League of Nations as a victory. After all, many Ukrainians in emigration organized themselves to protect the Ukrainian population against Poland. In general, based on the decision-making procedure, something else should not have been expected. He notes that the English, the Irish, and the Norwegians expressed their sympathy (Onatsky, 1932, pp. 35–40).

Ye. Konovalts considered the decision and the discussion that unfolded after the Japanese ambassador's report as the Ukrainian moral victory, and the Ukrainian deputies left with the decision to continue the fight with Poland in the League of Nations (Cherchenko, 2007, p. 293).

The Ukrainian issue continued to be discussed in the League of Nations. This discussion is connected with R. Sushko, who sent a petition about torture in the Polish prison back in November of 1931. On December 12, the Committee of the Three of the League of Nations considered the case of R. Sushko about the abuse of political prisoners by the Polish authorities and condemned these actions of the Poles, expressing the hope that the guilty would be punished

and that the abuse would not happen in the future (Onatsky, 1981, p. 611). These remarks were delivered to the Polish diplomats on December 21, 1931 (Sushko, 1933, p. 60).

On January 29, 1933, Ye. Onatsky reported at the end of the letter that A. Hitler had come to power in Germany (Onatsky, 1985, p. 35). On February 7, Ye. Onatsky gave an answer to the question of what to expect from A. Hitler's coming to power? First, you should not expect miracles. Secondly, he will deal with the reconstruction of the country, therefore, for a certain time, foreign policy issues will take a back seat, and accordingly, the Ukrainian issue will be non-vital (Onatsky, 1985, p. 53).

The meeting of M. Rudnytska and Ye. Onatsky in Rome with the director of the Eastern Europe Department at the Ministry for Foreign Affairs of Italy P. Quaroni was important for the future foreign policy emphasis of the OUN regarding the revival of the Ukrainian statehood. M. Rudnytska reported that the liberation of the Ukrainian lands under Poland was possible only after the liberation of the Ukrainian lands from Bolshevik occupation. The Ukrainian diplomacy would focus on this in the future. Because in Poland they believe that the Ukrainian movement in their country was a tool in the hands of the Bolsheviks against Europe. P. Quaroni replied that indeed, as long as the Ukrainians acted as enemies of Bolshevism, the Ukrainian issue would find support, but when the issue concerned Poland, there would be difficulties. At the end of the meeting, P. Quaroni recommended carrying out multifaceted Ukrainian propaganda, 70% of which should relate to Ukraine occupied by the Bolsheviks, and 30% to Poland. In addition, he expressed his opinion about three scenarios when the Ukrainian issue would become relevant for the world: 1. The war between Europe and the USSR; 2. Uprising in the USSR, because the situation there was catastrophic; 3. The revolution in Poland, which may take place after the death of J. Piłsudski (Onatsky, 1985, pp. 55–58).

During several weeks in Rome, M. Rudnytska with the assistance of Ye. Onatsky and his wife, held many important meetings with government officials, intelligentsia and even met with B. Mussolini. During M. Rudnytska's stay in Rome, Ye. Onatsky wrote several letters to Ye. Konovalets, informing about meetings and trips. In particular, he wrote about M. Rudnytska's meeting with B. Mussolini on February 17. Summing up her visit to Italy Ye. Onatsky wrote: "... she is an unusually valuable person for our cause, whom it would be a great pity to lose. A smart and comfortable woman in politics, and especially in diplomacy, is absolutely necessary" (Onatsky, 1985, pp. 60–79).

On March 2, Ye. Konovalets thanked M. Rudnytska for her help in a letter to Ye. Onatsky. However, he warned not to succumb to the illusion that this trip would bring any benefit in the near future. Ye. Konovalets reminded of the fact that M. Rudnytska was not a member of the OUN, belonged to the environment of political competitors, her worldview was far from theirs, she was a liberal and a democrat, and even a pacifist. Instead, her international activity is useful for the Ukrainian issue. Further he informed that the coming to power of A. Hitler activated some Ukrainian circles in Berlin, who "in the hope of big money from the Hitlerites" began to spread intrigues against the OUN (Onatsky, 1985, pp. 94–99).

On March 30, Ye. Onatsky informed Ye. Konovalets about the meeting with the German ambassador in Italy, where he raised the Ukrainian issue, which would be worth raising during the meeting of the leaders of Italy and Germany. R. Yary asked him to visit the Italian embassy in Germany (Onatsky, 1985, pp. 137–138).

At the end of March of 1933 Ye. Konovalets came to Berlin, and on April 3 he went to Gdansk. In one of these cities, a conference was held with the regional representation led by S. Bandera. Most likely, after this conference, S. Bandera began to perform the duties of

the head of the regional branch of the OUN. On April 6, Ye. Konovalts returned to Berlin, because he had a scheduled meeting with A. Rosenberg on April 8 (Posivnych, 2005, p. 130; Onatsky, 1985, pp. 140–141, 144). It is not known whether the meeting with A. Rosenberg did take place.

On June 3, 1933 invited participants of the OUN conference began to arrive in Berlin. There came to the conference: Ye. Konovalts, M. Kapustiansky, Ye. Onatsky, V. Bohush, V. Kurmanovych, R. Sushko, R. Yary, S. Chuchman, M. Sciborsky, D. Andriyevsky, O. Senyk, D. Demchuk, A. Fedyna, I. Reviuk, V. Martynets, M. Seleshko, I. Habrusevych, Ya. Baranovsky, Ye. Vretsiona, S. Bandera, V. Yaniv, B. Kordiuk, Ya. Stetsko, Oleksandr Sokil and M. Turchmanovych. From the memories of Ye. Vretsiona, the meeting place was the house of D. Levytsky. Commission meetings were held in the Ukrainian Press Bureau, which was located in the same building on the second floor. Volodymyr Stakhiv and Mykola Mytliuk helped solve household matters (Mirchuk, 2007, p. 249; Vretsona, 2021, p. 521).

“Attitude of the OUN towards Germany” was brought up for discussion as a separate issue. According to the conference participant Ye. Vretsiona: “Ye. Konovalts spoke against “imposing ties with the Nazis, motivating his position by a negative attitude of the National Socialist Party towards all the peoples of Eastern Europe – towards the Slavs in general, and towards the Ukrainians in particular. Hitler is not looking for allies in Eastern Europe, but a living space for his nation” (Vretsona, 2021, p. 524).

In general, as a result of the conference on international issues, a resolution was adopted, and the participants agreed that the current system of international relations in Europe was unfair, and therefore should be changed. As a result of the changes, Ukrainian state-building competitions would resume. A revived independent and united Ukrainian state will ensure balance in Europe. Ukrainian nationalists fight for the revision of international treaties. Accordingly, it is necessary to get closer to the forces of other peoples who fight for the revision of international treaties (Onatsky, 1985, pp. 249–251).

Also, after the conference, talks began about a plan to extend activities to the Ukrainian lands occupied by the Bolsheviks. At that time Ye. Liakhovych joined the OUN, whose main task was to develop the representation of nationalists in London (Onatsky, 1985, p. 265).

It is known that Italy, Germany, France and Great Britain signed the “Pact of Four” in Rome on July 15. This pact was supposed to strengthen the position of these states in the League of Nations in relation to smaller states. Ye. Konovalts did not ignore the appearance of this document: “No pacts and combinations of world politics will actualize our problem until we ourselves on the Ukrainian lands create such a situation that would force the world to treat it seriously. Therefore, I emphasize once again that the centre and specific weight of actualization does not lie in global combinations, but primarily in whether and what force we will imagine. That is an axiom from which we must proceed in our planning and in our activities in general” (Cherchenko, 2007, p. 373).

On September 23, 1933, the IXth Congress of National Minorities began its work in Bern. The Ukrainian delegation from Poland was represented by deputies of the Seimas Z. Pelensky and M. Rudnytska, and Volodymyr Zalozetsky and Yurii Serbeniuk from Romania. The Ukrainian delegation brought up the issue of famine in the USSR. Famine became the subject of consideration at the Congress. M. Rudnytska made a thorough report, emphasizing that this tragedy was of a national political nature, i.e. it was about the extermination of the Ukrainian nation. As a result of the work, the Congress adopted the resolution “On Famine Disaster in the UkrSSR”, calling on the world community to provide humanitarian aid (Solar, 2011, pp. 293–294).

Ye. Konovalets, R. Yary and Ye. Liakhovych represented the OUN at the Congress. M. Rudnytska needed support from Ukrainian nationalists in spreading information about the Holodomor in Ukraine and organizing aid. It was also up to M. Rudnytska to ensure that the appeal to the League of Nations was signed by representatives of the “European Association of Ukrainian Organizations Abroad”, which was headed by D. Andriyevsky. In this way, the Ukrainian emigration had to demonstrate unity in informing the world about the Holodomor in the UkrSSR and calling for help (Onatsky, 1985, p. 389).

In mid-December of 1933 Ye. Konovalets visited Paris, where he had a meeting with Ye. Liakhovych, the representative of the OUN in London. Ye. Liakhovych planned to meet with the Japanese ambassador to France, Nabumi Ito. However, I did not find him in Paris, because he moved to a new place of work in Warsaw. N. Ito was sent, through the Japanese embassy in Paris, to Warsaw the materials of the OUN. Then Ye. Liakhovych arranged the meeting in Warsaw for the first half of January of 1934. In turn, Ye. Konovalets ordered Ye. Liakhovych, M. Sciborsky and M. Kapustiansky to prepare a memorial for Japan. e. Onatsky asked to share ideas about the content of the memorial (Cherchenko, 2007, p. 397; Onatsky, 1985, p. 473).

The OUN planned to start diplomatic relations with Hungary. V. Vyshyvany, with whom contacts were restored in the middle of 1933, advised to pay attention to this country (Onatsky, 1985, p. 375). At the meeting of Ye. Konovalets and V. Vyshyvany in Paris, the issue of establishing cooperation with Hungary was discussed in more detail. Ye. Konovalets recommended that Ye. Onatsky and V. Kurmanovych would deal with it as the OUN representatives. In turn, V. Vyshyvany was supposed to facilitate a meeting with the Minister for Foreign Affairs (Onatsky, 1985, p. 483). However, diplomatic relations were not developed with Hungary.

At the end of January of 1934, Ye. Konovalets was upset when the “Non-Aggression Pact between Germany and Poland” was signed in Berlin, on January 26. This Pact delayed the actualization of the unjust borders issue. Although it is known that in his attitude to Germany, as of 1934, he was very cautious, without admiration for this state (Onatsky, 1989, p. 30).

An interesting trend noted by Ye. Konovalets in a letter to Ye. Onatsky dated March 24 was the desire of the Don and Kuban emigration forces to cooperate with the OUN. However, he believed that cooperation with them was not at the right time, because the OUN did not have any vision regarding the Don and the Kuban (Onatsky, 1989, p. 69). Three weeks later, D. Andriyevsky was given the task of starting a study of the issue of the peoples east of Ukraine and their desire to liberate themselves from the Bolshevik occupation. The idea of holding a conference of peoples occupied by the Bolsheviks was also raised (Cherchenko, 2007, p. 423).

Ye. Liakhovych took an active role in establishing the OUN in London, and began contacting the English politicians and journalists. However, he needed from Ye. Konovalets, an understanding of the foundations of the OUN’s international policy, especially the attitude towards Germany, and clear instructions: “In this issue, I would ask for precise instructions ... that you express your thoughts about my notes from time to time, because sometimes, having in mind the good of the whole organization and the whole nation, I get lost, and I have doubts about the expediency of my steps” (Onatsky, 1989, p. 30).

Ye. Konovalets, responding to a request to clarify the foundations of the OUN’s international policy, stated that there was none. There were several attempts to write it, but international processes were so dynamic that it was not possible to do so. Since 1929 there had been attempts to make different combinations. Current international politics was based on

a common sense, instinct and intuition. Therefore, among the potential allies were Germany, Italy, England and Japan. At the same time, the main focus was on Germany and Italy. As for England, the international policy boiled down to the fact that, in the case of assistance by Germany and Italy in the revival of Ukrainian statehood, England did not stand in the way. Help should not be expected from France. Therefore, politics boiled down to ensuring that France was not an enemy at the decisive moment. Accordingly, at present, the mission of Ye. Liakhovych was reduced to promoting the Ukrainian issue. Regarding Germany, Ye. Konovalets recommended the following position: "... we conduct propaganda for our cause in all states that are interested in the existence of a strong Ukrainian State, and in particular in those states that, in the future settlement of relations in Eastern Europe, will undoubtedly have a decisive influence and voice" (Onatsky, 1989, pp. 108–112).

On June 15, 1934, the regional leadership of the OUN carried out the assassination of the Minister for Internal Affairs of Poland, B. Pieratski, in Warsaw. After that, the international activity of the OUN found itself in a very difficult situation. In fact, it was almost invisible for three years. The Polish security forces managed to paralyze the OUN cells in Prague, Berlin and Gdańsk temporarily. Lithuania limited its support, and some members of the OUN left the country. In Prague, the OUN stopped publishing the main magazine "Building the Nation", and in Kaunas – the newspaper "Surma". Under the influence of a number of Soviet provocations and Polish articles, Ye. Konovalets was forbidden to live in Geneva, and in the middle of 1936 he was forced to leave Switzerland. At the end of 1936, he moved to Rome.

Ye. Konovalets reacted particularly negatively to Germany's actions. After all, it extradicted M. Lebed, the organizer of the murder of B. Pieratski, in Germany there was arrested the PUN member R. Yary and the others. This time, he described his attitude in a letter to O. Senyk on September 10, 1934: "Our rank-and-file membership at the ZUZ was unusually fascinated by the coming of Hitlerism to power and placed great hopes on it... . I several times, knowing the relationship, drew the attention of the Regional Executive to try to paralyze this calf-like enthusiasm for Hitlerism..." (Onatsky, 1985, p. 291).

The restoration of international activity took place in 1937. Ye. Konovalets, being in Geneva on June 18, 1937, in communication with the leader of the Ukrainian community in Switzerland Ye. Bachyna-Bachynsky, analysed the situation optimistically, made a forecast about the inevitability of war in 2–3 years and, if A. Hitler "does not go crazy with his imperialism of Great Germany", then Ukraine will have autonomy and its own army (Bachyna-Bachynsky, 2021, 827).

Contacts with Japan were also intensified at the time. In August of 1937, Ye. Konovalets, M. Kapustiansky and V. Kurmanovych met with Japanese diplomats in Vienna. They discussed the coordination of actions in the event of a war with the USSR. At approximately the same time, R. Sushko and R. Yary had the conversation with representatives of the Japanese military headquarters in Munich. They discussed the creation of an alliance of the Ukrainian national forces with the Don Cossacks, Turkestan and the peoples of the Caucasus against the USSR. In this alliance, the Ukrainian revolutionary army was supposed to be created in the Far East for the war with the USSR. However, after several months of negotiations, Ye. Konovalets did not sign any cooperation agreement with Japan. He understood that Japan balanced between attacking the USSR or the USA (Kapustiansky, 1987, p. 106). It was known that the attack would be carried out on the USA.

Characteristically, in its international activities, the OUN made almost no attempts to establish contacts with the US diplomatic circles. This was probably due to the fact that

the USA distanced itself from the events in Europe and clearly became closer to the USSR. Therefore, the PUN did not consider them as a party that could really help the Ukrainian liberation movement.

The Conclusions. Therefore, the international activity of Ye. Konovalets and the OUN can be divided into two periods. The first one is 1929 – 1934. During this period, there was an attempt to define conceptual issues of international politics. However, due to the lack of experience in international activities, a sufficient number of specialists and the dynamics of international processes, this was not done. In the process of discussing foreign policy, there was an initiative to unify with other stateless peoples of the former Russian Empire. Due to the lack of specialists and weakness of other national movements, this was not implemented. Instead, in 1930 – 1933, they launched international activities within the framework of the League of Nations successfully. Several times the Ukrainian issue became the subject of consideration in this global international institution. It mainly concerned the life of the Ukrainians in Galicia under the Polish occupation. Trying to convey the truth about the life of the Ukrainians in Poland, it was possible to establish diplomatic relations with Italy, Japan and England, which were engaged in the Ukrainian issue. Diplomatic relations were especially close with Italy, which was considered a kind of lawyer, both in the League of Nations and Germany. At the same time, Ye. Konovalets had no hope for Germany led by A. Hitler in support of the revival of the Ukrainian state. Instead, Germany and Japan were considered the strongest of those capable of breaking the borders formed after World War I. The OUN planned to use the situation in its favour. The second stage of international activity under Ye. Konovalets began in 1937. A kind of pause in international activity, lasting almost for three years, was connected with the murder of the Minister for Internal Affairs B. Pieratski by a member of the OUN in Warsaw. After that, Poland succeeded in getting the activities of the OUN branches in Czechoslovakia, Germany and Lithuania to be limited for a certain time. However, when it became clear that Germany's ambitions in the redistribution of Europe could not be put to rest, Ye. Konovalets and the PUN resumed international activities, especially with Japan. There was hope that this state would start a war with the USSR. Although joint actions with Japan were not agreed upon. In the end, we should state that Ye. Konovalets and the OUN in general in their international combinations did not develop relations with the USA.

Acknowledgement. We express sincere gratitude to all members of the editorial board for consultations provided during the preparation of the article for publishing.

Funding. The authors did not receive any financial support for the publication of this article.

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*The article was received March 15, 2024.
Article recommended for publishing 29/11/2024.*

UDC 94(477.87)“1938/1939”
DOI 10.24919/2519-058X.33.317476

Oleksandr PAHIRIA

PhD (History), Postdoctoral Student of the History Faculty, Taras Shevchenko National University of Kyiv, 60 Volodymyrska Street, Kyiv, Ukraine, postal code 01033 (bandusak@ukr.net)

ORCID: 0000-0003-2481-9769

ResearcherID: rid85565

Scopus Author ID: 58774677500

Олександр ПАГІРЯ

кандидат історичних наук, докторант історичного факультету, Київський національний університет імені Тараса Шевченка, вул. Володимирська, 60, м. Київ, Україна, індекс 01033 (bandusak@ukr.net)

Bibliographic Description of the Article: Pahiria, O. (2024). The problem of Polish military's complicity in the execution of Carpathian Sich members on the Veretskyi Pass in March of 1939. *Skhidnoieuropeyskyi Istorychnyi Visnyk [East European Historical Bulletin]*, 33, 166–180. doi: 10.24919/2519-058X.33.317476

THE PROBLEM OF POLISH MILITARY'S COMPLICITY IN THE EXECUTION OF CARPATHIAN SICH MEMBERS ON THE VERETSKYI PASS IN MARCH OF 1939

Abstract. *The purpose* of the article – based on a broad scope of available sources, foremost documents discovered in the Polish archives, to reconstruct events on the common border between Hungary and Poland in March of 1939 related to the involvement of Poland's military formations in violence against the combatants of Carpatho-Ukraine's armed forces on the Veretskyi Pass. **The research methodology** is based on general scientific principles of objectivity and historicism, which allows for considering the studied phenomena based on objective regularities in their internal relations and interaction with specific historical circumstances. At the same time, the following methods have been used: chronological, analysis and synthesis, internal and external critique of sources, and legal historical, which has allowed to sum up, consider the historical context of events, and avoid political stereotypes and prejudices. **The scientific novelty** consists in a detailed reconstruction of specific historical circumstances of the execution of the Carpathian Sich riflemen on the Veretskyi Pass, determining an approximate number of victims, defining the character of the acts of violence from an international humanitarian law perspective and its link with Poland's broader policy in the Ukrainian issue in 1938 – 1939. **The Conclusions.** In March of 1939, Poland acted not only as an energetic mastermind and inspirator of anti-Ukrainian policies of the Hungarian occupational authorities in Transcarpathia but also as an accomplice in the violence campaign in Carpatho-Ukraine which included participation in the killings of its citizens on the territory of a neighbouring state. New archival evidence indicates that summary executions of Carpathian Sich riflemen on the Veretskyi Pass took place on March 22, 1939, and not on March 17–18, 1939 as previously assumed. Their main perpetrators were the servicemen of Poland's Border Protection Corps (KOP). The minimal number of victims as documented by the Polish reports was 43. Herein, one should not exclude the possibility of individual executions on this strip of the newly created Polish-Hungarian border before and after March 22, 1939, however; they did not have the same scale. This, in turn, allows to refute assumptions that have dominated Ukrainian scientific and popular literature for a long time indicating the number of victims at 500-600, which eventually was not confirmed by the materials of archaeological excavations on the murder sites. The execution of the Carpathian Sich riflemen should be qualified as war crimes for they were committed in violation of the fundamental norms of valid international humanitarian

law – the Hague Convention and Geneva Convention – concerning members of Carpatho-Ukraine's National Defence. The crimes were sponsored by the state since the greenlight on their perpetration was given by the high military leadership of the Second Polish Republic, which was reflected in the materials of deliberations on March 15, 1939 with the participation of high-ranking commanders of the Polish troops deployed on the border with Carpatho-Ukraine.

Keywords: Carpatho-Ukraine, Carpathian Sich, Second Polish Republic, Czecho-Slovakia, Veretskyi Pass, war crimes

ПРОБЛЕМА ПРИЧЕТНОСТІ ПОЛЬСЬКИХ ВІЙСЬКОВИХ ДО РОЗСТРІЛІВ КАРПАТСЬКИХ СІЧОВИКІВ НА ВЕРЕЦЬКОМУ ПЕРЕВАЛІ У БЕРЕЗНІ 1939 Р.

Анотація. Мета статті – на основі широкого спектру доступних джерел, насамперед, віднайдених документів у польських архівах, реконструювати події на спільному кордоні між Угорщиною та Польщею у березні 1939 р., пов'язані з участю військових формувань Польщі у насильстві проти комбатантів збройних сил Карпатської України на Верецькому перевалі. **Методологія** дослідження базується на загальнонаукових принципах об'єктивності й історизму, що уможливили розглянути досліджувані явища на основі об'єктивних закономірностей, у їх внутрішньому взаємозв'язку та взаємодії з конкретними історичними умовами. Водночас використовувалися такі методи: хронологічний, аналізу та синтезу, внутрішньої та зовнішньої критики джерел, історико-правовий, що дало підставу зробити узагальнення, врахувати історичний контекст подій, уникнути політичних стереотипів і упереджень. **Наукова новизна** полягає у детальній реконструкції конкретних історичних обставин розстрілів карпатських січовиків на Верецькому перевалі, встановленні орієнтовної кількості жертв, визначенні характеру насильства з точки зору тогочасного міжнародного права та їх зв'язку з ширшою політикою Польщі щодо українського питання у 1938–1939 рр. **Висновки.** У березні 1939 р. Польща виступила не тільки енергійним натхненником й інспіратором антиукраїнської політики угорської окупаційної влади на Закарпатті, але і співучасником насильства в Карпатській Україні, взявши участь у вбивстві своїх громадян на території сусідньої держави. Нові архівні дані свідчать, що групі розстрілів карпатських січовиків на Верецькому перевалі мали місце 22 березня 1939 р., а не 17–18 березня 1939 р., як вважалося раніше. Головними виконавцями виступили службовці польського Корпусу охорони прикордоння. Мінімальна кількість жертв, яка фіксується у польських зведеннях, становила 43 особи. При цьому не виключається здійснення поодиноких страт на цій ділянці новоствореного польсько-угорського кордону до та після 22 березня 1939 р., однак вони, очевидно, не мали такого масштабу. Це, зі свого боку, дає підставу спростувати припущення, які довгий час фігурували в українській науковій та популярній літературі, про 500–600 загиблих, що, зрештою, не було підтверджено матеріалами археологічних розкопок на місцях вбивств. Розстріли карпатських січовиків треба кваліфікувати як воєнні злочини, оскільки вони здійснювалися у порушення основоположних норм тогочасного міжнародного гуманітарного права – Гаазьких та Женевської конвенцій про права військовополонених – щодо членів Національної Оборони Карпатської України. Злочини мали організований характер, оскільки карт-бланш на їх здійснення було надано вищим військовим керівництвом Другої Речі Посполитої, що було зафіксовано у матеріалах наради від 15 березня 1939 р. за участю командувачів польських військ, розгорнутих на кордоні з Карпатською Україною.

Ключові слова: Карпатська Україна, Карпатська Січ, Друга Річ Посполита, ЧСР, Верецький перевал, воєнні злочини.

The Problem Statement. In 1938 – 1939, pursuing its national interests Poland, together with Germany and Hungary, took part in the dismantlement of the Czecho-Slovak Republic (ČSR) – a major European democracy, which constituted a cornerstone of the international security system in Central Europe and a significant obstacle on the path of Nazi aggression. Following the Munich conference (29 – 30 September 1938), the Polish armed forces took part in the partition of the ČSR, which also included an episode with Hungary's occupation of Carpatho-Ukraine in March of 1939.

One of the most controversial topics in the scholarly and socio-political debates over the violence in Carpatho-Ukraine has been the issue of Poland's involvement in the execution of members of the Carpathian Sich on the Veretskyi Pass. This issue has been the subject of a bitter dispute in contemporary memory politics and, occasionally, in relations between Poland and Ukraine. As an example, one can mention Poland's MFA demarche over the opening of the Memorial to the Heroes of Carpatho-Ukraine in the village of Klymets', Lviv Oblast, on October 15, 2017, which was accompanied by the reburial of the remains of 22 Carpathian Sich riflemen uncovered by representatives of the "Dolia" society during search works on the Veretskyi and Uzhok Passes in 2008 – 2015. In this context, on October 17, 2017, the Polish MFA summoned Ukraine's ambassador Andriy Deshchytsia. During the meeting, Deputy Foreign Minister Bartosz Cichocki expressed his "astonishment" over the participation of Ukraine's Deputy Prime Minister for European and Euro-Atlantic Integration Ivanna Klympush-Tsintsadze (whose grandfather Dmytro Klympush was the Chief Commandant of the Carpathian Sich in 1938 – 1939) and other Ukrainian government officials, along with the Guard of Honour of the Armed Forces of Ukraine, in the solemn opening of the Memorial dedicated to the fallen Sich riflemen. The Polish MFA in its official communique drew special attention to the inscription on the Memorial's plaque: "To Carpatho-Ukraine's Heroes executed by Polish and Hungarian occupiers in March of 1939", and presumptuously stated that "so far no evidence was presented to support the claim about the mass execution of the Carpathian Sich riflemen in March of 1939, let alone Polish accountability for this crime" (Tereshchuk, 2017; Polshchu oburyv, 2017).

The Analysis of Research and Publications. For a long time, in Ukrainian historiography dominated a version based on unverified oral history accounts collected by the Ukrainian historians and local enthusiasts on the onset of Ukraine's independence which claimed that on March 17, 1939, the captured Carpathian Sich riflemen of Galician origin in 7–8 columns each 70–80 people under Hungarian convoy were taken from a camp in Kryva and a prison in Tiachiv (Tiachevo) and transported to the Veretskyi Pass. On the next day, they were passed over to the Polish border guards, who in two locations, 1.5–2 km from the frontier, on the outskirts of Verbiash and Nova Rostoka villages and between Petrosovytsia, Zhypany and Lazy executed by shooting around 500–600 Sich members from Galicia (Dovhei, 1996, pp. 159–161; Khudanych, 2005, pp. 56–69; Khlanta, 2009, pp. 133–135; Ofitsynskyi, 2018, pp. 4–7). The indicated numbers, as well as the very fact of mass shootings with the participation of Polish military formations, were repeatedly questioned in Polish historiography (Wojnar, 2018b, pp. 14, 25; Wojnar, 2018a, pp. 192; Jarnecki & Kołakowski, 2017, pp. 325). Some historians (Marek Wojnar) even saw in Ukrainian efforts to emphasize the Polish trace in the killings an attempt by "Ukrainian memory architects" to construct an "anti-Volyn" narrative (Wojnar, 2018b, p. 25). Among Polish military historians it is being asserted that incidents involving Polish troops opening fire at Ukrainian military refugees from Carpatho-Ukraine were predominantly sporadic without the approval of the high military command (Dąbrowski, 2007, pp. 332, 352; Deszczyński, 2003, pp. 332–333).

In current Ukrainian historiography, several attempts have been made to highlight the role of the Ukrainian issue in Poland's foreign policy and the broader international context in 1938 – 1939 (Hetmanchuk, 2008; Hetmanchuk, 2003, pp. 46–55; Trofymovych, L. & Trofymovych, V. 2013; Trofymovych, L. & Trofymovych, V., 2018, pp. 309–328; Trofymovych, L. & Trofymovych, V., 2019, pp. 251–270; Vidnianskyi, 2019, pp. 67–93; Vidnianskyi, Hrytsiuk & Lysenko, 2019, pp. 4–24; Pahiria, 2024, pp. 131–145). However, the issue of the involvement

of the Polish military in the execution of the Ukrainian combatants on the newly established border with Hungary has not occupied a proper place in the wider analysis of Polish aims vis-à-vis the Ukrainian issue on the eve of World War II.

The Purpose. Drawing on a broad scope of available sources (archival documents, archaeological data, oral history accounts, and memoirs) to reconstruct the events on the common border between Hungary and Poland in March of 1939 concerning the involvement of Poland's military formations in violence against the fighters of Carpatho-Ukraine's armed forces on the Veretskyi Pass. Since similar summary executions on other Carpathian Passes – the Yablunytskyi (Tatarskyi) and the Uzhok Passes – require special focus, they are not presented in this article. The publication is a follow-up to the author's scientific research of the topic of Polish violence in Carpatho-Ukraine (Pahiria, 2014, pp. 34–59; Pahiria, 2016, pp. 292–323; Pahiria, 2017).

The Results of the Research. Shortly after the outbreak of hostilities in Carpatho-Ukraine on March 14-15, 1939, Poland took measures to reinforce the protection and coverage of its southern border in the Carpathians with the view to prevent the potential penetration by groups of the Ukrainian political and military refugees into the Polish territory. In the night between 14 and 15 March of 1939, following orders by Marshal Rydz-Śmigły, a “D” mobile operational (strike) group of forces under the command of General Mieczysław Boruta-Spiechowicz was set up with headquarters in Lviv (later – Stryi). At the same time, a separate temporary command of the southern border commanded by Army Inspector General Kazimierz Fabrycy was established to oversee the strip of the border between Duklja and Zhabie. A group of forces under the command of General Juliusz Zulauf consisting of the Border Protection Corps (KOP) “Karpaty” regiment and various infantry and cavalry units responsible for border covering were also subordinated to the above-mentioned command. The total number of military assets deployed along the Polish southern border was equivalent to one and a half infantry divisions, reinforced by cavalry, armoured vehicles, and artillery. The Fabrycy group of forces had the following tasks: covering the state border line, preventing border crossings by the Carpathian Sich units into the territory of Eastern Galicia, disarming and interning Czechoslovak military and security forces. At the same time, the improvised formation commanded by Boruta-Spiechowicz of mountainous infantry brigade strength (established on the basis of the 22nd mountainous infantry division stationed in Przemyśl), was tasked to act as a potential “battering ram” conducting a ‘lightening’ incursion into Carpatho-Ukraine to the maximum depth of several dozen kilometres with the objective to carry out “pacification” of the Ukrainian armed resistance pockets in the border area. Units of the “D” operational group of forces received orders to push out any armed groups which would try to enter the Polish territory, as well as help KOP units in detaining individual refugees. A separate group's task was to assist the Romanian armed forces in the occupation of the eastern strip of the region and to serve as a buffer in the separation/deconfliction between the Hungarian and Romanian forces (Deszczyński, 2003, pp. 322–323). The deployment of Polish combat troops along the Carpatho-Ukrainian border was an unprecedented move which broke the Polish Army's peacetime management system (Wyszczelski, 2013, p. 290).

The Polish diplomacy and military intelligence informed in detail Warsaw on the conduct of the Hungarian operation to occupy Carpatho-Ukraine. The stiff resistance offered by the Carpathian Sich to the Hungarians caused anxiety in the Polish ruling circles which were concerned over possible international complications surrounding the events in the south of the Carpathians and possible Germany's encroachment. Fears of the Germans playing

a “Ukrainian card” against Poland were alive in Warsaw (Archiwum Akt Nowych, MSZ, sygn. 5437, p. 85). In particular, the Polish side was alarmed by reports about the advance of German forces towards Western Slovakia, as well as the agreement reached between Bratislava and Berlin on Germany assuming protectorate over Slovakia.

On March 16, 1939, Poland’s ambassador to Berlin Józef Lipski urged the Polish Ministry for Foreign Affairs to push the Hungarian side to accelerate their offensive due to fears that following Slovakia the Germans would grant protectorate to Carpatho-Ukraine (AAN, MSZ, sygn. 5437, p. 44; Žerko, 1998, p. 251). When ultimately the news broke on the Hungarian takeover of the region’s capital – Khust at 16:00 later that day, Lipski was still nervous and tried to prevent Carpatho-Ukraine’s President Avgustyn Voloshyn from “making any manoeuvres with the Germans” (AAN, MSZ, sygn. 5437, p. 46).

At the same time, Warsaw was concerned that the armed resistance in Carpatho-Ukraine, which did not have precedents in the entire ČSR and the whole East-Central Europe, would spill over its southern frontier into East Galicia and provoke internal disturbances against the backdrop of escalation of the Polish-Ukrainian relations. Given the involvement of many Ukrainian refugees from Poland in the armed struggle against the invading Hungarian troops, a ‘lightening’ operation called to suppress the Ukrainian resistance in the border areas suddenly surfaced on Poland’s agenda.

According to reports by the Polish consul in Sevlush Piotr Kurnicki dated 18 March 1939, due to a weak control exercised by Hungarian troops over the occupied area, the dispersed Sich units mainly composed of Galicians assembled in the Synevyr-Horb-Nimetska Mokra mountainous triangle while maintaining several villages under their control (AAN, MSZ, sygn. 5437, p. 88; Centralne Archiwum Wojskowe, VIII.800, sygn. 61/6, p. 39; AAN, Sztab Główny w Warszawie 1919 – 1939, cz. I, sygn. 616/362, p. 126). The Polish leadership was especially worried over reports indicating concentrations of large Carpathian Sich forces near the village of Yasinia, whence they allegedly intended to cross the border into Poland. Most likely, this fact pushed Warsaw to develop military plans envisaging the occupation of this area, which were later discarded because of the protests from Budapest (AAN, MSZ, sygn. 5437, pp. 62–63; DIMK, pp. 602–603).

As of March 18, 1939, the territory of Carpatho-Ukraine was occupied by the Hungarian army with its units reaching the Polish border on all Carpathian passes. In contact between Hungarian and Polish troops joint celebrations were spontaneously organized there to mark the establishment of the common frontier. In the second half of March 16, 1939, in the vicinity of the Veretskyi Pass, around the Klymets railway station, a first solemn meeting between the commander of the Hungarian operation in Carpatho-Ukraine, Colonel Alajas Beldi and the commander of the Polish “D” operational group of forces, Brigadier General Mieczysław Boruta-Spiechowicz in the presence of the “Karpaty” KOP regiment was held (CAW. VIII.800, sygn. 61/6, p. 49; *Magyar Nemzet*, 17 Március 1939, p. 3). Later in the day, a solemn meeting between the commander of Hungarian Corps 8, Lieutenant General Ferenc Szombathelyi, and Polish General Władysław Bortnowsky took place on this section of the border.

In the morning of March 17, 1939, the Hungarian and Polish troops held ceremonial fraternization assemblies near the village of Skotarske, where the Honvéds were greeted by the commander of the KOP “Karpaty” regiment, Lieutenant Colonel Władysław Ziętkiewicz and its honorary company. Simultaneously, solemn greetings took place on the Tatarskyi (Yablunyskyj) Pass, near Yasinia. In the night between 17 and 18 March 1939, the Hungarian troops met with their Polish counterparts on the Uzhok Pass. The final act of a

symbolic fraternization between the Polish and Hungarian troops involving representatives of both armies' staffs took place on March 19, 1939, at the Beskyd railway station, where the Hungarian Colonel Beldi, Polish Divisional General Fabrycy along with the army Corps 6 staff officers from Lviv, Brigadier General Boruta-Spiechowicz and the Hungarian military attaché Lieutenant-Colonel Lendel took part (Deszczycski, 2003, pp. 333–334).

Marking the establishment of the common Hungarian-Polish border, Hungary's regent Admiral Miklos Horthy sent a greeting telegramme to Poland's President Ignacy Mościcki in which he stated that "in this historic moment, where the Hungarian soldier extends his brethren hand to his Polish counterpart on the Hungarian-Polish border, I convey my warmest greetings to Your Excellency and the Polish nation" (*Magyar Nemzet*, 17 Március 1939, p. 2; *Slovenska Pravda*, 19 marca 1939, p. 1).

A general assessment of the results of the Hungarian operation in Carpatho-Ukraine and the tasks of the Polish troops deployed along the border was given by General Fabrycy in a report addressed to the Polish General Staff on March 17, 1939. According to the General, the operation of Polish forces to cover the border and assist the Hungarian troops in the execution of their tasks was complete. Then there began its second phase which focused on the suppression of the Ukrainian movement on the territory of Transcarpathia by Hungarian security agencies. During the "clean-up" operation, General Fabrycy expected that some Ukrainian individuals would try to escape to the Polish territory (Deszczycski, 2003, p. 333). Consequently, the main task of the Polish forces deployed along the border was to eliminate them. To establish cooperation with the Hungarian side, General Fabrycy appealed to the commander of the 24/III Hungarian battalion, which assumed the duty of guarding the border near the Veretskyi Pass, with a request to regularly provide the Polish side with situation reports from the occupied territories. At the same time, he declared the readiness of his troops to assist the Honvéd in carrying out their tasks in occupied Transcarpathia (Tóth, 2015, p. 301).

As the Hungarian reprisals against the Ukrainian activists in the region gained momentum, the Polish diplomats proposed radical steps to root out the Ukrainian movement from the Transcarpathia. On March 18, 1939, the newly appointed Polish ambassador to Bratislava Mieczysław Chałupczyński, who had previously served five years as the head of the Polish consulate in Uzhhorod, in a telegramme to Warsaw proposed to recommend to the Hungarian authorities swiftly to carry "de-Ukrainization" of the region without giving this campaign any publicity. The ruthless purge had to be carried out under the guise of the "liberation of the region from communist elements", while the very notion of "Ukrainian" had to be banned by a secret degree (AAN, MSZ, sygn. 5437, p. 97; CAW, VIII.800, sygn. 61/6, p. 40; AAN, Sztab Główny w Warszawie 1919 – 1939, cz. I, sygn. 616/362, p. 137).

During the Hungarian offensive, Hortist security agencies commenced "cleaning-up" the occupied territory from "unwanted elements". The main initiators of this violence campaign were the Hungarian militaries led by the Chief of the General Staff, General Henrik Werth, who took an uncompromising stance on the Ukrainian movement while viewing it as a hostile and completely outside-inspired phenomenon (Brenzovics, 2010, p. 58). The victims of Hungarian repressions were various strata of the local population, but they mostly targeted members of the Carpathian Sich, nationally conscious intelligentsia, Carpatho-Ukraine's state and party representatives and pro-Ukrainian Greek-Catholic clergy.

During the takeover of Carpatho-Ukraine, the Hungarian military did not abide by international humanitarian law and refused to respect the rights of Ukrainian prisoners of war (POWs) viewing them simply as "bandits" and "terrorists". During the military operations, the Honvéds often

without any trial executed captured Sich riflemen and their commander and killed the wounded by dumping them into the Tisza River (Dovhanych, 2007, pp. 79–82; Baleha, 1996, p. 139; Slyvka, 2009, p. 102; Segal, 2016, p. 58). For the captured Sich riflemen and Ukrainian activists, the Hungarians set up a network of prisons and camps throughout the region – in Kryva, Khust, Tiachevo, Velykyi Bychkiv, Rakhiv, Svaliava, Volovec and Velykyi Bereznyi.

In the context of Hungarian military aggression, a wave of mass violence involving both Hungarian and Polish militaries swept the occupied Transcarpathia. The participation of Polish troops in this was possible due the Second Polish Republic's own motives for committing violence against the Polish Ukrainians who had fled to the region, as well as due to its close cooperation with Hungary in the establishment of the common border in the Carpathians and repressive activities in the occupied territory.

The Poles were eager to eliminate the consequences of Carpatho-Ukraine's emergence on their borders and sought to coordinate and guide Hungarian punitive actions against the Ukrainian movement. In some cases, they independently took part in the killings of armed resistance members.

Some Polish sources mention cases of “frontier justice” exercised in the initial days of the armed conflict in Carpatho-Ukraine by employees of the Polish police, the Border Guards, and the KOP over individuals taking part in developments on the other side of the Carpathians. One of the participants of the “Lom” sabotage operation, Josef Kasperek mentioned instances of the killings of the Sich riflemen perpetrated by the Polish Border Guards by hanging them in the woods without witnesses (Kasperek, 1992, pp. 85, 89; Kasperek, 1989, pp. 365–373). One can find confirmation of the abovementioned facts in other Polish sources as well. Later, during World War II, a former Polish government official, Jerzy Stempowski in a letter to Stanisław Kot, a member of the Polish government in exile, described extra-judicial executions of the Sich members by employees of the KOP and the Polish police on the Polish-Hungarian border (Stempowski, 2014, p. 242).

New documentary evidence allows for defining a broader scale of the Polish military actions on the border and determining their state-sponsored character. In the Polish archives, Ukrainian historians discovered minutes of the Polish high military leadership's deliberations on March 15, 1939 regarding the situation on the Polish-Czechoslovakian border with the participation of the Chief of the General Staff of the Polish Army, General Waław Stachiewicz, as well as Generals Kazimierz Fabrycy and Mieczysław Boruta-Spiechowicz, which shed light on the treatment of Carpatho-Ukraine's defenders by the Polish military. During the meeting, its participants addressed the threat of Sich armed groups being pushed by advancing Hungarian troops across the Polish border. The Chief of the General Staff, Waław Stachiewicz announced the order by the General Inspector of the Polish Armed Forces, Marshal Edward Rydz-Śmigły to open fire upon Carpathian Sich members, while General Boruta-Spiechowicz reported his readiness to execute it. The minutes of the meeting confirm a clear position of the Commander-in-Chief of the Armed Forces of Poland in treating Carpatho-Ukraine's National Defence units, which appearance (even in the status of interned troops) in the south-eastern provinces of the Second Polish Republic was considered unwanted: “According to Mr. Marchal's [Edward Rydz-Śmigły] order, one must fire at those Sich members and if they fail to surrender, they must be immediately disarmed and interned. It is a different matter that Mr. Marchal did not want them to reach our territory at all, even if they would be interned. It better to push them back into the Rus' and let the Hungarians finish them off (...) but the principal wish of Mr. Marchal would be not to take this ballast

such as the various scums, that would want to get to us from there” (AAN. Sztab Główny w Warszawie, cz. I, sygn. 616/362, pp. 382–384).

The cited fragment of the document highlights the “green light” of the high military leadership of the Second Polish Republic on single and group summary executions of the Carpathian Sich members, who were pushed by the Hungarian forces to retreat into the Polish territory. On the one hand, it related to possible killings of members of Carpatho-Ukraine’s combat units during their attempts to cross the Polish-Czechoslovakian border. On the other hand, it concerned actions, aimed at disarming and interning them with their future transfer to the Hungarian side. Given how the Hungarians generally treated Ukrainian POWs, the Poles knew their destiny would be predetermined. Rydz-Śmigły’s order created conditions for acts of violence on the newly established Polish-Hungarian border. In contrast, the Polish military was ordered to show a completely different attitude towards Czechoslovak troops which were retreating into the Polish territory: they had to be disarmed and sent by railway transport to Bohemia and Moravia. The abovementioned report by General Kazimierz Fabrycy as of March 17, 1939 mentioning the task of “elimination” of Ukrainian refugees from Transcarpathia, was coherent with the oral instructions issued by the General Inspector of the Polish Armed Forces.

In the Polish archives, we found materials which confirm the execution of Rydz-Śmigły’s order and provide a possibility to establish the chronology and circumstances of the killings on the Veretskyi Pass, as well as to determine an approximate number of victims.

A weekly report by the Ministry for Internal Affairs of Poland (March 21–27, 1939) contains concise information on a series of armed clashes between KOP forces and the Carpathian Sich units, which took place on March 22, 1939 near the villages of Klymets and Zhupany. In one such clash involving a unit of 60 personnel from the Ukrainian side, 43 Sich members were killed. It is worth presenting the excerpts from the found document in full: “Under the pressure of Hungarian troops, which are occupying the territory of Transcarpathian Rus’, some Sich units were able to get across on the Polish side. In this context, several armed clashes took place involving KOP units carrying out duty in that district, while in one serious clash on March 22 near Klymets of Stryi county, 43 Sich riflemen were killed” (CAW, GISZ, sygn. 302.10.21, p. 52).

In a wider description of this encounter in the same document, more detailed information was recorded: “On 22.[0]3, between 2 a.m. and 4 a.m., in the vicinity of the border post of Klymets-Zhupany, Stryi county, a group of Sich members around 60 men strong attempted to illegally cross the border to get from Hungary into Poland. After having been noticed by KOP servicemen, the Sich members broke into a run, as a result of which the servicemen made several dozen shots at them. 43 Sich members were killed” (CAW, GISZ, sygn. 302.10.21, p. 53).

There are several contradictions and details in the two presented fragments of the report that do not correspond to the known facts. In particular, the information as of March 22, 1939 regarding the retreat of the Sich units under the onslaught of Hungarian troops seems to be completely unreliable, since it is known that the latter reached the Veretskyi Pass as early as March 16. On the same day, a solemn ceremony of the Polish-Hungarian “fraternization” was held on the “thousand-year border”. The struggle against the Carpathian Sich units scattered in the mountains did not cease, but it is impossible to talk about an “onslaught of troops” a week after the end of the hot phase of hostilities on the main axis of advance of the Hungarian army. Therefore, the presented circumstances of how Sich members were “pushed out” from Carpatho-Ukraine look implausible.

The first fragment provides information on several border armed clashes at once – an event, probably unusual for peaceful Poland – but without any further detail. Such generalization goes in hand with the description of the Ukrainian nationalists' activities in Eastern Galicia, Polish national democrats' boycott of Jewish trade, demonstrations in Lviv and Vilnius, citizens' withdrawal of bank funds, etc. Surprisingly, the authors decided to diminish several armed encounters on the state border, which had been a source of instability for several previous months, as well as an object of special attention by the military and political leadership of the Second Polish Republic. Instead, here presented a description of the largest clash that took place on March 22 (the dates of other skirmishes are not indicated in the document) near the Klymets border railway station with the Sich platoon (60 men), who allegedly tried to illegally cross the border into the Polish territory. One can immediately question the possibility of such a large (for the period discussed) crossing by the Sich unit through the Veretskyi Pass, considering significant concentrations of the Polish border and military units in this area. If to assume that the Sich riflemen were also natives of Eastern Galicia, then this version looks even more improbable, given the fact that many of them, beginning in the autumn of 1938, individually or in groups crossed the “green border” into Carpatho-Ukraine and were aware of the locations closely guarded by the Polish border guards (the Veretskyi Pass was one of them). In addition, the passage through the mountain at that time was difficult due to climate and weather conditions. In particular, in the report of the commandant of the Eastern Little-Poland District of the Border Guard as of March 22, 1939, it was described that the Sich members fleeing from Carpatho-Ukraine could not reach the territory of Poland due to difficult weather conditions, in particular blizzards, as a result of which the snow reached the height of three meters in some places (CAW, VIII.800, sygn. 61/6, p. 93).

However, the most glaring contradiction concerns the nature of the border incident. The first passage speaks of an armed clash, however, when familiarizing with a detailed description of the episode, one can easily ascertain that there was no encounter as such. The report's authors note that the KOP servicemen fired several dozen shots at the Sich members, who after having noticed the Poles began to run away (it is not known, though, in which direction). Herewith, 43 Sich members were killed from the group of 60. The authors did not say what happened to the rest of the group. If it was an armed clash and the Sich members were armed, the question arises: what losses did the Polish side suffer? The answer is none, because it was not an armed clash, but a group summary execution.

The conducted internal and external critique of the discovered source leads to the conclusion that the found report is almost the only documentary evidence of the execution of the Carpathian Sich members by the Polish military at the Veretskyi Pass. The official report on the events was most likely deliberately fabricated with the view to cover up the traces of the crimes. On the one hand, its authors sought to note down the very fact of the “incident” for military record, and, on the other hand, to do it in such a way as to hide its real circumstances. Despite the obvious falsifications, the report makes it possible to determine the minimum number of victims of the massacre – 43 people. This figure also correlates with the data collected by the Soviet “Extraordinary Commission for the Investigation of the Atrocities of the Hungarian-Fascist Invaders” in February of 1945. At the time, the residents of the village of Verbiazh testified that on the third or fourth day after the occupation, the Hungarian gendarmes convoyed 44 Sich members through the village, whom they shot at the pass at night. Residents concluded this from the shooting that was heard on the pass and the body parts that were later brought to the village by local dogs (Siiartova, 1967, pp. 385–386).

Over the reporting period (21–27 March 1939), this was the largest group of “transgressors” who died at the hands of KOP servicemen on the entire line of the Polish eastern and southern borders (together with three illegals in other areas). While speaking about the minimum number of victims, we are aware that their number could have been deliberately underrated. For instance, it is not known what happened to the rest of the 17 Sich members who most likely escaped the execution. It should also be considered that there may have been victims of other “armed clashes”, which the cited source does not mention.

But this, in turn, allows us to reject the previous assumptions that were based on unverified recordings of eyewitness testimonies conducted in the 1990s concerning the number of 500–600 people killed. It is hard to imagine that in such a short period it was possible to assemble from different places of captivity and massacre almost a third of Carpatho-Ukraine’s mobilized army.

It is also unlikely that the executions were carried out on March 17–18, 1939, as previously claimed by Ukrainian historians. The fact is that the Hungarian military was still busy with the occupation of the region these days and, most likely, could not carry out so swiftly the selection of captured Sich members of the Polish origin and their transport to the border. Furthermore, the Hungarian troops took over Tiachevo only on the evening of March 16, 1939, and they could not transfer the Ukrainian POWs from the local prison, where up to 500 people would be later concentrated, within such a short period. This also applies to the internment camp in Kryva – the largest in the occupied territory of Carpatho-Ukraine, which at the time was still at the stage of establishment.

Claims by individual authors that the transfer of Sich members of Galician origin was conducted based on some lists is also questionable. A dispatch of the Polish consulate in Uzhhorod dated April 11, 1939 complained about the Hungarians who had not yet handed over to the Polish side lists of captured Carpathian Sich members and materials related to the Ukrainian movement in Carpatho-Ukraine (AAN. MSZ, sygn. 5324, p. 13). Considering the speed with which the occupation of the region was carried out and the lack of personal data about the captives, the Hungarians apparently could not make their proper selection. Therefore, it is not excluded that among those killed at the Veretskyi Pass, there were also Sich members originally from Transcarpathia.

Additional details of the crime committed at the Veretskyi Pass are possible to establish based on memories and oral eyewitnesses’ testimonies, which, however, are secondary compared to archival documents. In particular, the writer Vasyl Grendza-Donskyj mentioned in his diary the shooting of a group of Sich members from East Galicia on the border near the village of Nyzhni Veretzkyi (nowadays – Nyzhni Vorota) with the involvement of Polish and Hungarian soldiers, as well as the fact that the corpses of the killed laid unburied for some time, as a result of which they were dragged around the neighbouring area by wild animals. Only after the appeal of the local Greek-Catholic priest Dmytro Revytskyi, did the Hungarian authorities allow to bury the remains of the bodies a few meters away from the border, and to place a wooden cross on the grave (Hrendzha-Donskyi, 2002, pp. 317–318). According to later evidence, during the burial, local officials found cartridge cases of Polish manufacture in the bodies of those killed (Dovhei, 1996, pp. 159–161).

The fact of the executions committed at the Veretskyi Pass was confirmed during oral history research conducted by the author in the villages of Nyzhni Vorota, Zavadka, and Verbiash, Mukachevo district, Zakarpattia Oblast in 2011. The respondents mentioned that the killings were carried out by the “Masurians”, i.e. the Poles (Archives of the “Territory

of Terror” Memorial Museum, Interview with Anna Korobynefs (born in 1925), July 2011, Verbiash, Volovetsk district, Transcarpathian Oblast, interviewer O. Pahiria; Interview with Mykhailo Matola (born 1922), July 2011, Verbiash, Volovetsk district, Transcarpathian Oblast, interviewer O. Pahiria).

Archaeological data has failed so far to prove the scale of the executions on the Veretskyi Pass. During the exhumation works carried out by the “Dolia” society in 2008 – 2011, the remains of ten bodies of Sich members were found between the villages of Verbiash and Nova Rostova and the remains of seven more – between the villages of Lazy and Zhupany. On the latter location, bullet holes from a Polish Mauser carbine and a Polish-made Vis.35 pistol were found on two craniums. The victims were dressed in both military and civilian clothes. Czechoslovak coins from the 1920s and 1930s and a Swiss watch, which most likely belonged to a senior Sich officer, were found among personal belongings (Onyshchuk, 2009, pp. 48–50; Onyshchuk, 2011; Kozak, 2011).

Smaller-scale shootings and executions took place before March 22, 1939 on other sections of the newly formed Polish-Hungarian border. The order issued by the commander of the “D” operational group, Brigadier General Mieczyslaw Boruta-Spiechowicz dated March 21, 1939, praised non-commissioned officers and guards of the “Dolyna” KOP battalion (“Karpaty” regiment) for “the conscientious performance of official duties during patrolling the border, namely, firing well-aimed shots at dangerous fugitives who were killed on the spot” (Archiwum Straży Granicznej w Szczecinie. KOP Brygada Podole 185, zesp. Pułk “Karpaty” Batalion Graniczny “Dolina”, sygn. 163, p. 60). From the reports of the Polish military intelligence, it is known about the execution on March 21 of a Ukrainian Lesia Dankiv, who, after being detained for illegally crossing the former Czechoslovak border, tried to escape from the KOP convoy. Three shots ended the life of the transgressor (AAN. Sztab Główny w Warszawie, cz. I, sygn. 616/362, p. 105). The “Dolyna” battalion was stationed in the Dolyna-Ludwikowka triangle (nowadays – Myslivka) – Osmoloda and was on duty on the 83 km stretch of the border from the Torunskyi to Yablunyskyi Pass.

The Conclusions. In March of 1939, Poland acted not only as an energetic mastermind and inspirator of the anti-Ukrainian policies of the Hungarian occupation authorities in the Transcarpathia, but its militaries were also involved in violence in Carpatho-Ukraine by having participated in the killings of captured Sich members. This is evidenced, in particular, by the fact that the tasks of the Polish troops deployed on Poland’s southern border in the second half of March of 1939 included not only blocking the passage of Ukrainian refugees from the other side of the Carpathians and pushing them back, in the case of entering Polish territory but also carrying out a limited invasion to pacify the border areas in the event of a direct or indirect threat to Poland’s security interests. Under the latter one can easily indicate the “dangerous” activities of the Carpathian Sich units in the border area.

One of the largest acts of violence against the captured Sich members took place at the Veretskyi Pass. The discovered archival documents with their critical analysis allow us to better reconstruct the circumstances and chronology of these killings, as well as to determine an approximate number of victims. They provide evidence that the group shootings at the Veretskyi Pass took place on March 22, 1939, and not on March 17–18, 1939, as previously assumed. Their main perpetrators were the servicemen of the Polish Border Protection Corps (KOP). The minimal number of victims recorded in Polish documents was 43. At the same time, individual executions on this section of the newly created Polish-Hungarian border before and after March 22, 1939 cannot be ruled out, but they most probably did not have

such a scale. This, in turn, allows to refute the previous assumptions that have dominated Ukrainian scientific and popular literature for a long time, about 500-600 victims, which, in the end, was not confirmed by the materials of archaeological excavations at the murder sites.

The executions of the Carpathian Sich members should be classified as war crimes since they were carried out in violation of the fundamental norms of valid international humanitarian law – the Hague Convention and Geneva Convention on Prisoners of War – against members of Carpatho-Ukraine's National Defence. This was related to serious violations of Article 1 of the Hague Convention concerning the Laws and Customs of War on Land (1907) and Articles 2, 3, and 46 of the Geneva Convention relative to the Treatment of Prisoners of War (1929)¹. These acts were also a gross violation of the constitutional rights of Polish citizens, refugees from Eastern Galicia, who made up most victims. The crimes were state-sponsored since the “green light” on their perpetration was given by the high military leadership of the Second Polish Republic, which was reflected in the materials of the meeting of 15 March 1939, with the participation of the commanders of the Polish forces deployed on the border with Carpatho-Ukraine. While being directly involved in the murder of captured Sich members on the Carpathian passes, the Polish side at the same time tried in every possible way to incite the Hungarian side to carry out large-scale repressive actions against the Ukrainian movement and resistance participants in the occupied territory.

¹ According to Art. 1 (Regulations) of the Hague Convention concerning the Laws and Customs of War on Land, adopted on 18 October 1907, the armed forces of Carpatho-Ukraine fell under the definition of a belligerent (the presence of senior leadership responsible for their subordinates, identification emblems recognizable at a distance, open carrying of weapons, compliance with the laws and customs of war) and had all the rights on par with other participants in the conflict. According to Art. 2 (Regulations) of the Hague Convention, even inhabitants of a territory which was not occupied, who, on the approach of the enemy, spontaneously take up arms to resist the invading troops without having had time to organize themselves in accordance with Article 1, shall be regarded as belligerents (with the provision of the corresponding rights) if they carry arms openly and if they respect the laws and customs of war. The provisions of the Convention applied equally to armies, militias, and volunteer units, which were some spontaneously formed units of students who volunteered to defend Carpatho-Ukraine from Hungarian aggression. They were part of Carpatho-Ukraine's National Defence and therefore, guided by Art. 1 of the Convention, were included in the “army” category. Along with the combatants, they had to enjoy the rights of POWs in case of captivity.

As of March 1939, another important international legal document was in force – the Geneva Convention relative to the Treatment of Prisoners of War (POW) adopted in 1929 (later revised and supplemented in 1949). It expanded the provisions of the 1907 Hague Convention, contained 97 articles and prohibited repression and collective punishment of POWs. The application of the Convention covered both cases of declared war or any other armed conflict that could arise between two or more parties, and cases when the state of war was not recognized by one of the parties (as it is known, Hungary officially did declare war neither on the Czech-Slovak Republic, nor on Carpatho-Ukraine). According to the provisions of the Geneva Convention, POWs included not only military personnel of the belligerents, but also members of the militia or volunteer formations that were part of their armed forces, and members of organized resistance movements. In accordance with the provisions of the Convention (Art. 2, 3, 11, 12, 13), they were guaranteed all the rights of POWs, including the right to humane treatment, respect for their person and honour, proper conditions of detention, medical care, provision of sufficient water, food, clothing, footwear, underwear, hygiene products, etc. The document required the signatory states to treat prisoners of war humanely, prohibited any acts of violence and measures of reprisal against them.

Violations by the Hungarian and Polish military of these basic international conventions, which were valid as of 1939, allows to classify them as war crimes. In international law, actions or inactions during armed conflicts that constitute serious violations of the laws and customs of international humanitarian law and are criminalized under international treaties or customary law are defined as war crimes. The International Military Tribunal in Nuremberg, which administered justice to the Nazi leadership after the war, recognized that violations of the Hague Conventions of 1899 and 1907 and the Geneva Conventions of 1929 were war crimes under international law, since the validity of these conventions at the time of 1939 was recognized by all civilized countries.

It should be noted that not all violations of international humanitarian law equate to war crimes. The general conditions for defining war crimes are as follows: 1) the violation must constitute an infringement of the rules of international humanitarian law; 2) these rules must be customary in nature; 3) the violation must be serious; 4) the violation must involve individual criminal liability of the person who violates these rules. A prerequisite for war crimes is their connection with hostilities during an armed conflict. War crimes can only be committed by individuals, not by legal entities. Neither organizations nor states can be prosecuted for war crimes in international criminal tribunals.

A detailed reconstruction of other executions of captured members of the Carpathian Sich in the Yablunyskyi (Tatarskyi) and Uzhok Passes, as well as the role of Poland in persecuting members of the Ukrainian movement on the territory of Slovakia, Romania, and Hungary, will make it possible to determine a wider involvement of the Second Polish Republic in the destruction of Carpatho-Ukraine as the Ukrainian state phenomenon.

Acknowledgment. The author is grateful to Miroslaw Czech, Ivan Patryliak, and Ostap Kozak for their valuable scientific and methodical recommendations during the preparation of the article.

Funding. The author's trips to Polish archives were made possible owing to the support of Professor Wasyl Janischewskij Scholarship Fund from the Ukrainian Canadian Research and Documentation Centre, Toronto, Canada.

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*The article was received April 11, 2024.
Article recommended for publishing 29/11/2024.*

UDC 94(477)-055.2“1939/1945”
DOI 10.24919/2519-058X.33.317473

Volodymyr GINDA

PhD (History), Senior Researcher of the Department of Military-Historical Research, Institute of History of Ukraine of National Academy of Sciences of Ukraine, 4 M. Hrushevskogo Street, Kyiv, Ukraine, postal code 01001 (ginda@ukr.net)

ORCID: 0000-0001-8373-148X

Oleksandr LYSENKO

PhD hab. (History), Professor, Head of the Department of History of Ukraine during the Second World War, Institute of History of Ukraine of National Academy of Sciences of Ukraine, 4 M. Hrushevskogo Street, Kyiv, Ukraine, postal code 01001 (olysenko555@gmail.com)

ORCID: 0000-0002-4003-6433

Володимир ГИДА

кандидат історичних наук, старший науковий співробітник відділу воєнно-історичних досліджень, Інститут історії України НАН України, вул. Грушевського, 4, м. Київ, Україна, індекс 01001 (ginda@ukr.net)

Олександр ЛИСЕНКО

доктор історичних наук, професор, член-кореспондент НАН України, завідувач відділу воєнно-історичних досліджень, Інститут історії України НАН України, вул. Грушевського, 4, м. Київ, Україна, індекс 01001 (olysenko555@gmail.com)

Bibliographic Description of the Article: Ginda, V., & Lysenko, O. (2024). Sexual assault against women in Soviet partisan units. *Skhidnoievropeyskiy istorychnyi visnyk [East European Historical Bulletin]*, 33, 181–196. doi: 10.24919/2519-058X.33.317473

SEXUAL ASSAULT AGAINST WOMEN IN SOVIET PARTISAN UNITS

Abstract. *The purpose* of the study is to do the research on the issue of sexual assault among Soviet partisans and against the civilian population, to clarify its moral and psychological foundations and behavioral models. **The methodological basis** of the study is a combination of interdisciplinary research tools in the field of gender studies and history of everyday life. An appropriate, special conceptual apparatus has been used. **The scientific novelty** of the research is determined by the formulation of the problem, methods of solving it, conclusions, and the complex of sources used. **The Conclusions.** The existential nature of World War II had various manifestations and forms, covering all spheres of social existence. The destruction of the established legal field under conditions when several military political powers fought on the territory of Ukraine occupied by Hitler's troops (German occupation units and garrisons, "red" partisans, participants in the Ukrainian national liberation movement, Polish nationalist underground), the civilian population was in an extremely difficult situation, having no protection from various types of violence, including sexual assault. War causes the spread of legal nihilism, a sharp lowering of a moral threshold, trivialization of coercion and armed violence. Women become the least protected category of participants and contemporaries of war. Enshrined in tradition and specific stereotypes of mass consciousness, gender behaviour models among the Soviet partisans doomed women to stigmatized social roles, when in the absence of gender parity, they were assigned the function of a subordinate, secondary,

servicing cohort. The image and status of the Soviet “people’s avengers,” formed (largely owing to the Bolshevik propaganda), de facto secured for them a position that was often interpreted as permissiveness and impunity for any actions, including those that were prosecuted under the Soviet criminal law. If male partisans, prone to deviation, abuse and sexual violence, were guided by purely physiological reflexes (less often by the desire for punishment or satisfaction), the behaviour patterns of the majority of potential and actual victims of sexual assault were motivated by survival strategies. The efforts of the military political leadership of the USSR to eliminate sexual assault were not entirely successful. A large number of women became victims of severe physical and psychological trauma and post-traumatic stress disorder for many years after the war.

Keywords: German-Soviet War, Ukraine, partisans, gender relations, sexual assault, civilian population.

СЕКСУАЛЬНЕ НАСИЛЛЯ НАД ЖІНКАМИ В РАДЯНСЬКИХ ПАРТИЗАНСЬКИХ ЗАГОНАХ

Анотація. Мета дослідження полягає у науковій реконструкції феномену сексуального насильства у середовищі радянських партизанів і стосовно цивільного населення, з’ясуванні його морально-психологічних підстав і поведінкових моделей. **Методологічне** підґрунтя розвідки становить поєднання міждисциплінарного дослідницького інструментарію в руслі гендерних студій та історії повсякдення. При цьому використовується відповідний, спеціальний понятійний апарат. **Наукову новизну** матеріалу визначають постановка проблеми, способи її розв’язання, висновки та узагальнення і комплекс залучених джерел. **Висновки.** Екзистенційний характер Другої світової війни мав різні вияви і форми, охоплюючи всі сфери соціального існування. Руїнування усталеного правового поля за умов, коли на окупованій гітлерівськими військами території України вело боротьбу кілька військово-політичних потуг (німецькі окупаційні структури і гарнізони, “червоні” партизани, учасники українського національно-визвольного руху, польське націоналістичне підпілля), цивільне населення потрапляло у вкрай складне становище, фактично не маючи захисту від різних видів насильства включно із сексуальним. Війна спричиняє поширення правового нігілізму, різке зниження морального порогу, баналізацію примусу і збройного насильства. Найменш захищеною категорією учасників і сучасників війни стають жінки. Закріплені традицією і специфічними стереотипами масової свідомості моделі гендерної поведінки у середовищі радянських партизанів, прирікали жіноцтво на стигматизовані соціальні ролі, коли за відсутності статевого паритету йому відводилася функція упослідженої, другорядної, обслуговуючої когорти. Сформований (багато в чому завдяки більшовицькій пропаганді) образ і статус радянських “народних месників” де-факто закріплював за ними становище, часто трактоване як уседозволеність і безкарність за будь-які дії, зокрема й ті, що переслідувалися радянським кримінальним правом. Якщо чоловіки-партизани, схильні до девіації, аб’юзу та сексуального насильства, керувалися суто фізіологічними рефлексами (рідше – прагненням покарання чи сатисфакції), то моделі поведінки більшої потенційних і реальних жертв сексуального насильства вмотивовувалися стратегіями виживання. Зусилля військово-політичного керівництва СРСР, спрямовані на унеможливлення насильства на сексуальному ґрунті, не мали цілковитого успіху. Велика кількість жінок стали носіями важких фізичних і психологічних травм і посттравматичного синдрому упродовж багатьох років по війні.

Ключові слова: німецько-радянська війна, Україна, партизани, гендерні стосунки, сексуальне насильство, цивільне населення.

The Problem Statement. The German-Soviet war was fought not only at the front and frontline, but also in the rear, where partisan and underground forces of various political orientations fought actively. One of the most famous aspects of this confrontation, due to political and propaganda factors, was the activity of the Soviet partisan units on the territory of Ukraine. In the USSR tens of thousands of scientific, popular, purely propagandistic publications, and fiction were devoted to this issue, which aimed at glorifying or even

canonizing this movement in an official commemorative model. That is why, during that period, it was impossible to find any materials and research that would go beyond the rigid Soviet historical framework. But with the collapse of the USSR, historians were able to study a wide range of documents, including original sources, that related to various aspects of the German-Soviet war, including the partisan movement. The original sources allowed historians to look at the activities of paramilitary formations not from the angle of heroization and romanticization of events, but through the prism of military rear reality with all its positive and negative consequences, where the focus was not on the leadership role of the Communist Party or the state, but on a person with all his or her experiences, everyday troubles, interpersonal relationships, and behavioral patterns. As a result of the research efforts, various studies of the Soviet partisan and underground movement appeared, aimed at reconstructing an everyday life of the “people’s avengers”, their relations with the civilian population, organizational problems, and the specifics of partisan social environment. Among them, there should be mentioned the publications by Iryna Petrenko and Oksana Mazur (Petrenko & Mazur, 2023), Mykola Yezerskyi, Pavlo Kryshniy (Yezerskyi & Kryshniy, 2019) and Mykhailo Slobodianiuk (Slobodianiuk, 2017). Despite scholarly pluralism, the issue of sexual assault in Soviet partisan units remains on the periphery, likely due to its politicization and ambiguity, and a certain sentiment inertia.

The Review of Recent Research and Publications. In modern Ukrainian historiography, there are several studies on the above mentioned issue. These are the studies by Volodymyr Poliakov (Poliakov, 2009; Poliakov, 2011; Poliakov, 2013), who analysed this issue in the Crimean partisan units and Volodymyr Ginda (Ginda, 2013; Ginda, 2021). Sexual assault among the UPA soldiers was researched by Marta Havryshko (Havryshko, 2015; Havryshko, 2016).

In foreign historiography, this issue is reflected in many publications. Thus, the Russian historian Olexander Gogun focuses on the non-status and intimate relationships between men and women in partisan units and notes that sometimes they took on immoral forms, and debauchery and sexual violence in the units became the cause of “free relations between the sexes, which were promoted in the USSR at the beginning of the 1920s, the struggle of the communists with religion, changes in the country’s way of life caused by World War I, and socio-economic changes during the two five-year plans and the disruption of a natural gender-age pyramid of society” (Gogun, 2012). American researcher Earl Zimke wrote about intimate life in partisan units and its prohibition among rank-and-file (Armstrong, 2007). German historians Senke Naitzel and Harold Welzer, referring to rape during the war, note that partisans often used it on captured enemy women as punishment, which was also practiced by Wehrmacht soldiers (Neitzel & Welzer, 2013).

Sexual assault against the Jewish women in partisan units is reflected in the publications by Necham Tek (Tek, 2003), Dave Teilor (Teilor, 2019), Bohdan Musial (Musial, 2009), Anika Walke (Walke, 2011), Leonid Smilovitsky (Smilovitsky, 2006) and Maksym Hon and Nataliia Ivchuk (Hon & Ivchuk, 2022) and the others. The rape of women by members of partisan movements based on ethnic revenge and “legendary or pseudo-partisan groups” with the aim of discrediting the enemy was studied by American researcher Jeffrey Burds (Burds, 2015) and Belarusian researcher Sviatoslav Kulinok (Kulinok, 2018).

The main segment of the research source base is the reports of Soviet partisan units and detachments, accumulated in the funds of the central archives of Ukraine and the collections of documents “Russian Archive: The Great Patriotic War. Orders of the People’s Commissar of Defense of the USSR. 1943 – 1945” (Barsukov, 1997), “Women of the Great Patriotic

War” edited by Nataliia Petrova (Petrova, 2014), “The Partisan Movement in Crimea during the Great Patriotic War. Collection of Documents and Materials” (Malgin, Kravtsova & Sergienko, 2006). Sexual assault is a separate section in the collection of documents about the Soviet partisans edited by Anatoliy Kentii and O. Gogun (Gogun & Kentiy, 2006). Non-statutory relations among partisans are reflected in the full version of the diary entries of participants in the partisan movement F. Tkachenko, M. Sheremet, Ya. Bashmak, K. Stepanov and P. Khymych, prepared for publication by the Institute of History of the NAS of Ukraine and the National Museum of the History of Ukraine in World War II (Lehasova, 2015), and also in a documentary story written by P. Berezovska, a participant in the partisan movement in Chernihiv region (Berezovska & Diachenko, 2006).

The purpose of the study is to do the research on the issue of sexual assault among Soviet partisans and against the civilian population, to clarify its moral and psychological foundations and behavioral models.

The Results of the Research. During the German-Soviet War, the ranks of the Soviet partisans numbered, according to various estimates, from 200 to 300 thousand participants. The number of women who participated in the resistance movement is also not fixed and ranges about 28–100 thousand (Zhenshchiny Velikoi Otechestvennoi voiny, 2014, p. 7), which is about ten times less than men. From the very beginning, women in partisan units were discriminated on the basis of gender. They were usually assigned secondary roles: they washed clothes, cooked, cared for the sick or wounded, etc. The majority of commanders and rank-and-file partisans did not take into account professional, underground, or combat qualities of women in the units, but received them as a “sexual object”. That is why, women in the forest were rarely taught combat skills and had to earn their “place in the sun” themselves. A partisan Nadiya Vasevych, speaking on August 14, 1943, at a women’s meeting of one of the partisan brigades, complained: “They look down on us in the brigade, many girls with tears in their eyes ask for combat missions, but the commanders don’t involve them. We often hear such words: “She must not be involved in a combat operation – she’s a woman”. The majority of us don’t know anything about rifles, and we don’t have any” (Zhenshchiny Velikoi Otechestvennoi voiny, 2014, pp. 270–271). The head of the Kovpak intelligence service, Petro Vershyhora, recalled that in his unit, the partisan Nina literally pleaded for a machine gun and finally got it, and the intelligence rank-and-file Hanna stayed in the unit, because she knew how to find moonshine and moonshine making devices among the local population. Owing to this “gift”, she earned authority among partisans and got the nickname “Anka the moonshine maker” (Vershyhora, 1975, pp. 67, 103).

But in addition to the contemptuous attitude in military affairs, sexual assault, rape, constant harassment, forced sex, both physical and moral abuse became a harsh everyday experience for many women in the units. The “people’s avengers,” being far from command and control centres, were more susceptible to numerous temptations than regular troops. One of them was the desire to have sex with a woman he liked, even without her consent. This reflected a sense of lack of control and permissiveness in the territory controlled by the partisans. Women’s attempts to change the state of affairs ran into persistent masculine stereotypes entrenched in the mentality and mass consciousness of partisans, while possession of weapons and the status of “people’s avenger” fueled self-confidence and a sense of impunity. If a woman or a girl refused to engage in one-time sexual contact or cohabitation, it could even cost her life. In such cases, it was extremely difficult or practically impossible to prove the guilt of the commander for his involvement in a woman’s death.

On June 16, 1944, the UShPR received a report from a partisan Mykola Sendziuk, the Kutuzov detachment under the command of A. Odukh, in which he asked to draw the command's attention to a sexual harassment of the chief of staff, Major Krykunov. In the report it was indicated that the partisan leaders did not shy away from even blackmail during harassment. A partisan noted: "Krykunov led a dissolute life... He threatened his own partisans with sending them to the front if they did not allow him to have sex with their wives. (After the Red Army troops took control of the territory where the partisans operated, they were checked in the rear, and then they were either sent to the front or left in place to establish a peaceful life – *Authors.*). It happened to my wife Vasylyna Nitsevich... I didn't let him. But then, counting on me not being at home, he came to my house and suggested going for a walk in the forest, promising her to leave me at work. Having gone to the forest, he proposed to marry her, promising various awards. There were many similar cases. I ask you to take measures" (CSAHAU, f. 62, d. 1, c. 533, p. 9).

The actions of the commanders usually showed a contempt for women and their privacy; they reacted negatively and angrily to refusals and resistance, convinced that women partisans they liked had to satisfy their sexual desires without any refusal. In some partisan units, the issue of intimacy lost its privacy and became a subject of general discussion and praise of partisans in the presence of women who were actually being talked about. In addition to the fact that such misogynistic treatment humiliated them in the eyes of others and traumatized them psychologically, they also had to resist many "suitors" in the future who received information about their alleged easy availability. Thus, the commissar of one of the partisan detachments in the Crimea, Mykhailo Buskadze, following his commander, decided to make the wife of the deceased colleague his mistress. Having invited the woman on a date, he immediately began to cling to her, trying to kiss her. When she, outraged by this behaviour, remarked that she was taking life more seriously and practically did not know the "cavalier," she heard in response: "What are you talking about! Why do you need to know me? The party and the government know me, so take off your underwear and lie down" (Poliakov, 2013, p. 243). In S. Kovpak unit, the commander of one of the detachments believed that he had the right to intimate relations with all newly arrived women and girls, and in many cases he adhered to it. Everyone in the detachment knew about it, but kept silent (CSAHAU, f. 62, d. 1, c. 533, p. 46). A veteran of the Vinnytsia unit, Ya. Melnyk, during an interview with O. Gogun, said that the commissar of "For the Fatherland" detachment, M. Yekhalov, forced women to cohabit, and "took them by force" (Gogun, 2008, p. 369).

The same partisan commanders who were rebuffed, using their power, could send women to accomplish the most difficult missions for refusing intimacy, demote them for the slightest offense, and shoot them on charges of "collaborating with the enemy" or "espionage". The partisan P. Braiko wrote about this in a report addressed to S. Kovpak about the commander of one of the detachments of the Kovpak unit, V. Kudriavsky: "He harassed women," writes P. Braiko. "He harassed the miner-instructor L. Nikolskaya. From the first days after his arrival, Kudriavsky wanted to have sex with her, but Nikolskaya refused, then he disarmed her and sent her as a rank-and-file to the squadron, hoping that she would subdue, but he was mistaken. She died heroically in the battle..." (CSAHAU, f. 62, d. 1, c. 533, p. 46).

In addition, commanders had many opportunities to resort to sexual assault against their female subordinates not only within the units, but also outside them. This assault was facilitated by the peculiarities of a partisan life and combat operations, which sometimes required "soldiering" from the forest in small groups of 2–3 people. In cases of intimacy

refusal, the commander could take the woman with him on a combat mission, reconnaissance or “household operation”, during which he could rape and kill her, or shoot her, accusing her of treason or collaboration with the enemy. This is exactly what the squadron commander of the Shchors partisan detachment of the first Chernihiv unit, O. Platonov, did: he raped the female Sofia, during one of the missions, and then killed her, accusing her of treason. In Ivan Khytrychenko Kyiv unit, during a “business operation” in the village of Huto-Mariatyn (Zhytomyr region), the commander Hryshchenko raped a girl arrested on suspicion of espionage. Trying to hide his crime, he insisted on her being shot, although by that time it had already been determined that she was not a spy (CSAHAU, f. 77, d. 1. c. 3, p. 109v).

The vast majority of women were forced to endure sexual abuse and harassment because they had almost no opportunity or courage to complain. Some were ashamed of these facts, the others tried to avoid condemnation for “immoral behaviour”, which was often the case for girls who could not preserve their honour (Havryshko, 2015, p. 206). Some were afraid that their commanders would send them on risky missions from which there would be no return, or accuse them of collaborating with the enemy, which would mean being shot. Those who did complain to senior partisan commanders usually encountered misunderstanding or silence about the problem, because such forced sexual contacts were also practiced in their environment. For example, Oleksiy Fedorov did not pay attention to sexual harassment in his units. And in some cases, he even made girls do it. His deputy, Mykola Popudrenko, judging by archival documents, was a known womanizer in the unit. Anton Brynsky noted that he had several women with whom he constantly sorted out relationships. (CSAHAU, f. 62, d. 1, c. 1308, p. 30). As M. Popudrenko’s “forest wife” later stated, he initially demanded her sexual submission, she complained to O. Fedorov, but this was unsuccessful. The first secretary of Chernihiv regional committee “calmed down” the woman partisan, saying: “He is actually a good man, you can live with him”. Only after being threatened with execution “for espionage” did the woman surrender, but when she became pregnant, she was exiled to another unit, out of sight of her “husband”. When she gave birth, her baby was killed by order of the new commander, and the mother was sent to the Soviet rear (Gogun, 2012, p. 426).

Trying to avoid such situations, women in partisan units tried to have one boyfriend who protected them from a constant harassment of other men. Nina Zhydkova, recalling non-status relationships in the unit, noted that many commanders had their own “forest wives” (this is what the partisans called the commanders’ mistresses – *Authors*). Often, a young girl was molested by boys, but annoying suitors bypassed her because she had an affair with the commander of the detachment (Zhydkova). Relatives (brothers, fathers) could also protect women against harassment in the detachments, but only in cases where they held high positions in the partisan hierarchy. The daughter of the commander of Battalion 4 of Sydor Kovpak unit, even asked to be sent to another unit due to her father’s excessive care, because she wanted, as Petro Vershyhora notes: “to be just a partisan, not a battalion commander’s daughter” (Vershyhora, 1975, p. 386). Their profession in the “forest” also provided some protection for female partisans: if a woman or girl had skills valuable for the “people’s avengers,” this could restrain male ardor. The profession of a doctor, a signalman, a radio operator, and even the ability to cook well could protect against sexual harassment if no one else could do it except a woman. In such cases, complaints about sexual harassment to higher commanders could have positive consequences for her.

It is worth noting that there were also women who voluntarily entered into intimate relationships with partisan commanders, counting on various preferences in partisan units in

the future. In particular, they could take advantage of their husband's position and his access to vital resources.

Partisan sexual atrocities against civilian women

The ordinary "people's avengers" had limited opportunities to engage in sexual contact with female partisans. Firstly, there were few women in the units, so there were not enough of them for all the men; secondly, they preferred commanders who could better provide for them in terms of living, and thirdly, many units had prohibitions on sexual contact between men and women, which, however, were mostly required to be observed by rank-and-file personnel. O. Gogun notes that the main motive for the bans was the desire not to overcrowd the units with families, children and women, which would limit the maneuver ability of the units significantly (Gogun, 2012, p. 428). Soldiers had to look for victims outside the units among civilians. Armed with weapons that gave them a sense of unlimited power over the defenseless, partisans often resorted to sexual assault against civilian women and girls they liked. They explained such actions in a rather primitive way: they said, "We are fighting the occupiers, we are being bitten by lice in the forests, and here you have sex with German officers, but you don't want to have sex with us". Sexual aggressiveness was compounded by the lack of a normal family comfort and the use of alcohol, as most rapes were committed when partisans were intoxicated. Alcohol usually stimulates sexual desires in people and blurs the line between what is permissible between a man and a woman, and also provokes aggression towards others. Some partisans had a tendency towards deviant behaviour, uncontrolled sexual aggression, perverted ideas about intimate life, or experiences of violent sexual contacts that were hidden from justice during the pre-war period. In civilian life, all this was prohibited at the legislative level, so it was difficult to implement them without punishment. Another thing was a partisan everyday life: "partisan forest", "economic operation", "raid in unfamiliar areas", punitive action against a traitor and his relatives, weakness and defenselessness of potential victims, all this gave fighters a variety of sexual opportunities. After all, in these cases, partisans were their own masters, had unlimited power and many options to realize their desires, concealing them, or justifying their actions.

Analysis of partisan reports and recollections of participants from that time show that the most common victims of sexual abuse (especially group abuse) were women and girls who accidentally met drunk partisans in the field or forest, or those who found shelter in the forests from the Germans and had no connection to the Resistance Movement. Sometimes these sexual victims were Jewish women who were hiding in groups or alone in forests or villages from Nazi terror. It was mainly their defenselessness, lawlessness, racial intolerance, lack of witnesses, and the ability to avoid punishment that provoked the partisans to commit sexual crimes. (Tek, 2003; Kulinok, 20018; Smilovitsky, 2006; Musial, 2009). When a partisan or policeman saw an attractive woman in front of him during interrogation, he, using his power over her, did not miss the chance to violate her sexual integrity, forcing her to expose her naked body or excessively pressing her body during a search. Sexual assault during armed conflicts can also have a military psychological significance as a means of intimidation and demoralization of the enemy.

It is worth noting that the sexual atrocities of partisans against civilian population differed in their motivational and determinative component from harassment and rape in the detachments. Among partisans, these crimes were in the absolute majority committed under the pressure of the natural intimate desires of mainly young men who had power over women they liked. Sexual crimes against civilians, on the other hand, had a multitude of

motives (including biological satisfaction), objectives, and options. The only thing they had in common was that they both breached the law.

The analysed documents of the Ukrainian State Police indicate that the Soviet partisans often committed rape in Western Ukraine. In the reports of units deployed in Sumy, Zhytomyr, Chernihiv, or Kyiv regions, there are few mentions of sexual assault against women, but they increased during the raids into Halychyna. This is explained to some extent by the attitude of the “red” partisans towards the inhabitants of this politically turbulent region and the corresponding mood among the local population. The vast majority of Galicians considered the Soviet partisans to be representatives of the Stalinist totalitarian regime and supported the Ukrainian insurgents. Accordingly, the partisans treated them as enemies, especially the population of those villages or towns where the UPA units were stationed. M. Havryshko notes that the rape of women belonging to the enemy community is often a weapon of the warring parties, a way of communication between dominant and subordinate masculinity. It should not be dismissed that the partisans were not too concerned about their reputation during the raids: they probably hoped that they would not soon return to the scenes of their crimes. Being in the same territory, it is more pragmatic to think about establishing normal relations with the population in order to be able to receive food, clothing from them, or not be betrayed to the enemy. However, ideological and political reasons often conflicted with a common sense. During a raid, all this could be taken by force if the residents did not want to give it up voluntarily.

Reports on rape of civilian women by the Soviet partisans are often found in reporting and information documents of the Ukrainian nationalists. Thus, in the “General Political Review of the Brest-Kobrin District for August of 1943” it was stated: “The Reds mercilessly rob the population, terrorize it, rarely go sober and even rape women” (CSAHAU, f. 3833, d. 1, c. 116, p. 1). And there is the information on what the OUN members reported regarding the actions of the Red partisans in Horokhiv district of Volyn region in February of 1944: “Operating in villages, the Reds raped women. In the village of Voromli, during the rape of five girls, a red senior lieutenant came in, and when he forbade this act, he was almost shot” (CSAHAU, f. 3833, d. 1, c. 129, p. 59). The situation in Kovel region, according to the reports of the OUN underground member for February of 1944, was not better. “The Reds rob the population to the bone. In the villages of Mshantsi, Holovna (nowadays Liuboml district of Volyn region – *Authors*) and the others, they raped women and girls” (CSAHAU, f. 3833, d. 1, c. 129, p. 51). The Ukrainian insurgents of Ternopil region noted in their reports for March of 1944 that the Soviet partisans were not limited to fighting; their other task was to search for vodka and lard. In the report from one of the UPA units from Zhovkva district dated April 8, 1944, it was stated: “When they get vodka, they (“red” partisans” – *Authors*) drink it until they lose consciousness. They throw weapons, shoot in the house, roll on the ground. They rape women en masse. There are “queues” going to the raped women. 10–20 men go to one raped woman. There are mass cases where 20 to 50 women are raped in one village” (CSAHAU, f. 3833, d. 1, c. 126, p. 65).

To clarify the scale of sexual assault committed by the “red” partisans, information from independent formations should be verified with the Soviet sources, as the authors of the OUN reports and memoirs could have “exaggerated” this aspect. In the documents of the Ukrainian Special Operations Command there are mentioned the many facts of sexual assault against civilians by the “people’s avengers”. Cases of sexual assault were described in detail by former partisans of the Budionny unit, V. Buslaiev and M. Sydorenko, in the report

they sent to S. Savchenko, the head of the NKVD of the Ukrainian SSR. In the document it was specifically stated the following: “During quartering in the village of Holybisy, Shumsky district, Volyn region, a foreman Mezentsev, while drunk, beat two girls with a spinning wheel, demanding their consent to cohabitation. In the village of Dubovtsi, near Ternopil, a woman aged 40–45 was raped by the partisans Hardonov, Panasiuk, Mezentsev, the detachment commander Bubnov, and others. The victim’s last name is unknown. In the village of Verkhobuzh, near Brody, a sergeant Mezentsev tried to rape a girl and her 65-year-old mother, he took her outside at night and demanded her consent to have sex, pointing the gun to her. He put her against the wall, shot with a machine gun over her head, and then raped her... In one village, I don’t remember the name, near Sniatyn, a sergeant Mezentsev, drunk, pulled out a gun and tried to rape a girl who ran away, then he raped her grandmother, 60–65 years old. When the apartment was searched, a lot of communist literature was found. According to the neighbours, the grandmother’s son was a teacher and a member of the Communist Party, for which he was arrested and shot by the Germans. Another son was in the Red Army, conscripted in 1940.

The commander, Pavlo Bublyk, personally incited the fighters, he was engaged in selling horses for vodka, which he took back before leaving... He drank, systematically, and conducted illegal searches independently, and demanded vodka from the population. He always did this with a gun in his hands, shot in apartments, and intimidated the population. In the village of Byskiv (in the Carpathian Mountains), in the apartment of the unit headquarters, the cook shot through the windows, kitchen utensils, and ceiling because he wanted to rape the landlady, but she ran away.

Robberies were carried out, of course, during searches under the pretext of searching for “spies” or “Bandera members,” and places where other valuables might be found were searched – watches, razors, rings, expensive suits, which were taken away without any explanation” (CSACAU, f. 62, d. 2, c. 300, pp. 58–60).

The NKVD leadership demanded explanations from the unit command. In the report, Captain Makarov, the commander of the “For Kyiv” detachment, explained everything quite simply: he denied all the facts, and accused the partisans who wrote such a note of “treason to the homeland” and “connections with Bandera” (the complainants left the detachment and went to the rear of the Red Army) (CSACAU, f. 62, d. 2, c. 300, p. 63). This type of response from the command of partisan units was common in cases of accusations of looting, drunkenness, or sexual assault. The paradox was that before that, Makarov did not even suspect that there were two “Bandera members” in his detachment, but as soon as they wrote their report on the violations in the detachment, he realized that they were “enemies”. The case was probably not publicized. At least, it was not possible to trace its further progress due to the lack of any documents indicating the punishments of those involved.

Rumors of mass sexual abuse by partisans and looting of civilians spread among Galicians quickly. It got to the point that frightened women, hearing about the approach of the “people’s avengers”, would leave their homes and flee to the forest in hope of salvation. “The population usually knew about the approach of our partisan unit 30–40 km away. And in the last days you could find villages abandoned, only grandfathers stayed there, and empty houses. When asking the population why they ran away, they explained as follows: “We are not afraid of the Red Army, but we are afraid of those dressed in civilian clothes, they rob so much, rape women and beat innocent people,” wrote V. Buslaiev and M. Sydorenko in the report (CSACAU, f. 62, d. 2, c. 300, p. 63). Nataliia Leontovych-Bashuk, an active

participant in the Ukrainian nationalist movement in Zakerzonnia, recalled that when the Soviet partisans appeared in the region, they often resorted to sexual assault against local women. In particular, she recalled the story of one woman who had to face “people’s avengers”. “When the Bolshevik partisans raided the house, they stayed at the house for three months. She had to cook for them, wash their shirts, even though she said she was a widow. Every night she slept in a different place – under the ramparts, in the field, or somewhere else, because the Muscovites hunted for women.

And the children ran after me. When the youngest cried too much, I had to throw him to the wind, and I ran away into the forest... and that’s what all women did” (Lenko, 1999, p. 59). In 1992, Lutsk resident R. Sydorчук, in a conversation with a journalist of the newspaper “Volyn” P. Boyarchuk, recalled that peasants were more afraid of partisans than bandits: “At first, I spent my time in the cellar, waiting out their attacks, and then in the apiary, in a corner where there were thickets and impenetrable nettles, my father dug a hiding place for me. He worried about me so much” (Boyarchuk, 1992, p. 5).

Ordinary partisans could rape and kill wives, sisters, and daughters of collaborators whom they considered responsible for the actions of their relatives who collaborated with the Germans. They did the same with German spies when they fell into their hands. In addition to satisfying their sexual desires, partisans in this way tried to send a message to members of collaborationist formations or administrative institutions about what awaited their relatives for collaborating with the enemy. One of these stories was told by the aforementioned R. Sydorчук. According to her, in October of 1943, partisans from A. Brynskyi’s units resorted to horrific scenes of assault against women who were relatives of local riflemen in the village of Stara Rafalivka. At first, when the detachment appeared near the village, the “red” partisans behaved appropriately, because they did not have a significant number of fighters and could not openly oppose the Ukrainian insurgents and the Germans, but when they grew in number, they began to resort to brutal reprisals against the civilian population in case of non-support of their ideas. “Our good relations with the ‘petrivsiamy’ (as the people called O. Brynskyi’s partisans – *Authors*) ended as soon as they came into force,” the woman said. – It all started when “Uncle Pete’s” partisans began to “judge” families whose boys were the Schutzmanns. Then, for the same reason, they committed a savage massacre in the Pasevych family. In it, besides the elders, there were two girls, and boys – Mykolai, Dmytro and Leonid, who were the Schutzmanns. The eldest, Pasevych, was killed immediately. Later, in front of her mother, they raped her eldest daughter, Lisa. And they shot everyone... They did the same thing to the Palamarchuk family... there were seven children in the family. Sons Ivan (he joined the Schutzmanns), Andriy, Heorhiy and daughters Nadia, Klava, Yulia, Vira... All the Palamarchuks, except Ivan and Heorhiy, whom the partisans did not find at home, were made to kneel and shot. Nadia was dealt with especially cruelly; she was raped, her arms were twisted, and she was tortured. Klava was also raped before being killed” (Boyarchuk, 1992, p. 5).

W. Langfeld, the German soldier, recalled how the Soviet partisans captured a bus with 30 German signal-women in the forest near Bobruisk. The Germans later recaptured the women from the enemy, but all the girls had already been raped by that time (Neitzel & Welzer, 2013, p. 165).

Sometimes the partisans were driven to such actions by incredible hatred and a desire for revenge for their murdered relatives. In the diary of Mykola Sheremet there is an entry about the headman of one of the villages of Chernihiv region, who, using his position, took

beautiful women and girls by force. The partisans caught the criminal and punished him: they hung him, cut off his penis and put it in his mouth (Lehasova, 2015, p. 185).

The rape, humiliation, and mutilation of the bodies of girls and women were also used by partisans (of various political orientations) as punishment for belonging to the enemy or the enemy nation. One of these episodes is described in the scandalous book “The Executioner” by a soldier of the Polish Home Army, Stefan Dombiski, who, as a 17-year-old boy, joined a special unit of the Home Army (*Armia Krajowa* in Polish) and was a witness and participant in the Volyn events of 1943. In one village, its leader, having “counted out” a Ukrainian girl among three girls who lived together in a house, decided to punish her with gang rape. “She was young and very beautiful, “Twardyi” decided that the best punishment for her Ukrainian origin would be if all three of us raped her” (Spovid kata, 2011).

During the UPA’s confrontation with the Soviet authorities, suspicion or affiliation of a girl with the Ukrainian underground often led to her being humiliated by the NKVD fighters or investigators. They used rape not only as a punishment for other political views, but also as a method of torture during interrogations and intimidation of women who had contact with the insurgents. In Horodochchyna region, the NKVD, conducting raids to search for Bandera supporters, caught a seventeen-year-old girl suspected of collaborating with the insurgents, and staged a sexual orgy over the poor girl (Moroz & Vovk, 2009, p. 81). On April 1, 1945, the NKVD investigators released six girls from the village of Kustyna, Lviv region, who had been arrested on suspicion of collaborating with the UPA. The girls were severely beaten, raped, and sexually infected in prison (Moroz & Vovk, 2009, p. 179). In some cases, investigators, taking advantage of their position, offered female suspects intimate relations in exchange for dropping charges of involvement in the insurgent movement.

Members of legendary or pseudo-partisan units used the rape of civilian women actively. As D. Burds notes, the rape of women by “legendary detachments members” was a kind of tactical weapon for the USSR special services in the fight against the UPA, which was intended to increase the conflict and distrust between the local population and the UPA (Burds, 2004, p. 337). The Soviet partisans also resorted to such methods when they entered settlements under the guise of police units or auxiliary German troops. A similar practice was used by O. Saburov’s units (Lehasova, 2015, pp. 196–197).

The command staff’s fight against sexual crimes

In partisan units, they tried to combat sexual promiscuity using various methods: they shot the guilty of sexual atrocities, forbade sexual relations with women, sent women from units, and discipline was supervised by political commissars or the NKVD officers sent from the “Great Land”. Thus, the commander of the partisan regiment S. Hryshyn issued an order prohibiting partisans from having sexual relations with women. In the units of O. Fedorov, S. Kovpak (“order” No. 200), and M. Naumov, those guilty of sexual atrocities against women were shot. Here are a few such examples. In O. Fedorov’s unit, there was a case when two drunken soldiers raped a woman in one of the villages of Galicia. Upon learning of this, the command ordered the rapists to be shot in front of the villagers (CSACAU, f. 1, d. 22, c. 18, p. 6). In M. Naumov’s unit, a rank-and-file was shot for a similar incident in January of 1944. (CSACAU, f. 62, d. 1, c. 42, p. 114). In the J. Stalin partisan detachment, the intelligence chief was executed for raping a girl in a village while drunk (Lehasova, 2015, p. 89).

Usually, many of the above mentioned prohibitions remained on paper, as it was difficult for unit commanders to control the actions of their fighters during raids or “economic operations”. At that time, it was possible to shoot a victim, accusing her of “anti-Sovietism,”

“resistance to the partisans,” “collaborationism,” “treason,” etc. In addition, the command feared revenge from subordinates who could shoot them in the back during the battle. On March 25, 1944, Khrushchev partisan unit (2nd Voronezh) under the command of the deputy commander of the guard, Captain Olexander Maminov, and Chief of Staff Mykola Vynohradov passed through the town of Verba in Rivne region. The leadership of the “people’s avengers,” having drunk heavily, staged a brawl in the town. The commandant of the headquarters of Army 13, Lieutenant Colonel Svislotsky, in a report addressed to a member of the military council of Army 13, Major General M. Kozlov, wrote: “I report: the entire command staff of the formation was drunk, the officers were detained by me and were rude and ill-mannered people. Lieutenant Vynohradov committed a series of riots on the way from the village of Stolts to the town of Verba and in the very Verba. A group of officers of the unit, at the initiative of the chief of staff, forcibly took away from citizen Ivan Opanasenko his two daughters - Tetiana and Halyna. The girls then managed to escape” (CSACAU, f. 62, d. 2, c. 300, p. 42). When during the investigation the head of the unit’s counterintelligence was asked, “Why didn’t he stop his commanders?”, he replied that if he contradicted them, they would kill him, and wondered why this case ended without bloodshed at all, especially during the detention (CSACAU, f. 62, d. 2, c. 300, p. 42v.).

It is worth noting that those guilty of sexual assault were not always shot. Sometimes they were given the opportunity to atone for their guilt in battles with the enemy, but usually in cases where the rapist was a distinguished soldier or commander. Such a case took place in I. Khytrychenko’s detachment. The above mentioned commander, who in Zhytomyr region raped a girl suspected of espionage, was removed from his post by the leadership, demoted to rank-and-file, and offered to “atone for his crimes in the battles against the German occupiers in the nearest future” (CSACAU, f. 77, d. 1, c. 3, p. 109v.).

Sexual abuse and harassment in partisan units had a depressing psychological impact on the rank-and-file, often leading to conflicts and undermining discipline. Women who suffered from it, in addition to psychological and physical trauma, were stigmatized by others, which prevented them from living normally and performing their functions in the units. Some of them resorted to suicide, others left the units, collaborated with the enemy in order to take revenge on their offenders. Pregnancy could be an additional problem for a woman.

The appropriate behaviour of the partisans turned the civilian population against them, which made it difficult for them to stay in their areas of base, limited the possibilities of intelligence, the source of which in many cases was the inhabitants of the surrounding villages, threatened the population with surrendering their places of deployment to the enemy, gave the enemy indisputable facts for anti-partisan propaganda, etc. The partisan leadership understood this perfectly well and in individual units tried to react promptly. “These and other actions of the partisans were used by the Germans. Showing the partisans as bandits and looters, they called on the population to betray them. Our party committee considered it its duty to wage a resolute fight against this kind of behaviour and called on the partisans to treat the population loyally. We demanded this from all commanders of partisan detachments and groups,” wrote S. Malykov after the war, who was the commander of the M. Shchors partisan unit, which operated in Zhytomyr region (SAZhR, f. 1376, d. 1, c. 189, p. 36).

Another equally important problem caused by sexual assault and uncontrolled intimate life was the spread of sexually transmitted diseases. The women who became the source of venereal diseases, according to the Soviet regulations, were to be treated properly, giving them the right to treatment. But usually, angry commanders who became infected, seeking

revenge, gave the woman a difficult combat mission, during which she died. Some, realizing that they would not return alive, refused to carry out the order: they were arrested and shot for refusing to carry out a combat mission. Thus, at the end of October 1943 A. Brynsky wrote to the USHPR that venereal diseases had spread among the fighters. The “source” was a married woman, Yevdokiia Kuznietsova, who infected four commanders and two ordinary partisans (CSACAU, f. 1, d. 22, c. 20, p. 56). One of the sick commanders shot the woman. In order to hide the crime, according to the testimony of the former partisan of this brigade, Faina Solomian-Lots, Yevdokiia was executed according to the documents on the charge of “traitor to the Motherland” (Gogun, 2008, p. 371). A. Brynsky reported to the USHPR that he had dismissed the commander from his position. The relevant facts testify to the lack of rights of women in partisan units and the power of commanders over them. After all, instead of sending Yevdokiia Kuznietsova for treatment, the commander simply shot her, without suffering any criminal punishment for it.

Similar massacres were not widespread among the partisans. Commanders tried to limit the desire to lead an uncontrolled sexual life with the help of disciplinary sanctions or threats of execution. For example, the commander of the Shchors partisan detachment of Chernihiv formation, Fedir Tkachenko, threatened to shoot the cook of Squadron 3, M. Veresovych, after she infected a soldier (Lehasova, 2015, p. 135). The medical department at the USHPR also suggested that doctors of partisan units conduct preventive lectures among the fighters and, if possible, the civilian population about sexually transmitted diseases and their consequences (CSACAU, f. 62, d. 1, c. 1784, p. 56). But such calls usually remained on paper.

Units that had connections with Moscow and sent patients for treatment to the Soviet rear. The deputy commander of Chernihiv formation, V. Vasiuk, wrote in a memo dated October 17, 1943 to the head of the intelligence department of the USHPR, Mokrov, that after syphilis was discovered in a radio operator and rank-and-file (there was an affair between them), they were placed in a partisan hospital at the USHPR. Later it became known that the rank-and-file was a German spy and was trying to recruit the radio operator. As a result, both were shot in June of 1943 (CSACAU, f. 62, d. 1, c. 217, pp. 87–87v.). In 1942, 174 partisans suffering from gonorrhea were hospitalized at the USHPR hospital. (CSACAU, f. 62, d. 1, c. 1784, p. 40). From May of 1943 to December of 1944, 105 venereal patients passed through the sanitary unit of the Ukrainian partisan headquarters, 94 of them were infected with gonorrhea, 11 – with syphilis (CSACAU, f. 62, d. 1, c. 1784, p. 76). Considering the number of partisans who operated on the territory of Ukraine (about 220 thousand during the entire war), this is an insignificant figure, although the true scale of the spread of these diseases was much greater.

The situation was more complicated in the detachments that had no connection with the USHPR and no appropriate medicines. In general, the problem of shortage of medical supplies was urgent for all formations. In such units, venereal patients could be shot in front of the line due to the impossibility of treatment. American historian Earl Zimke, in his study of partisan life, gives an example of a female doctor who deserted from a partisan unit in 1943 and told the Germans that her unit received small doses of a vaccine to treat typhus and a special soap to remove lice. She claimed that in one partisan detachment, ten men and two women infected with syphilis were shot because they could not be treated under field conditions (Armstrong, 2007, p. 209).

The Conclusions. As sources indicate, in partisan units women and girls were often subjected to sexual assault and harassment by commanders. The factors that provoked such behaviour were the corresponding worldviews and stereotypes, the lack of a regular sexual

life with women, which was not a problem in pre-war life, unlimited power over subordinates. A significant role in such actions was played by a misogynistic attitude towards women and gender inequality that existed among partisans. Sexual assault against female partisans and civilian women outside of units is characterized by a motivational component. Sexual crimes against civilians could have many motives and reasons: from the natural desire to satisfy one's own "sexual hunger" in such an illegal way to revenge, punishment, intimidation of the population, etc., while among partisans they were usually provoked by a physiological need for sexual life.

Women and girls could often be raped because of their nationality or political orientation, so women hid their nationality (Polish, Ukrainian, Russian), religion, and worldview whenever possible. Sexual assault was often used by partisans as a way to demoralize the enemy. According to documents, the Soviet partisans committed sexual crimes during raids in Western Ukraine mainly, because they considered representatives of this region to be enemies and did not care much about their reputation.

Sexual crimes affected the moral and psychological situation in the units negatively, undermined discipline, incited the civilian population against the partisans, and provided an opportunity for fruitful anti-partisan propaganda by the enemy. That is why, the command of the partisan units tried various methods to combat this phenomenon, which did not yield the necessary results due to the impossibility of controlling the actions of partisans outside the units, the fear of commanders of possible revenge by subordinates in battle, the importance of fighters for partisan activity, etc. Raped female partisans were mostly left alone with their problems because they could not complain about their abusers-commanders, were afraid of the condemnation of others, and were intimidated by their abusers.

In conclusion, it is worth emphasizing that a thorough development of the outlined issue is still ahead. Historians in this matter should go beyond the systematization of examples of sexual violence, paying attention to the development of methodological approaches to the study of intimate life among partisans. In the future, it is worth analyzing the strategies through which civilian women and partisans tried to avoid violence, how they experienced post-traumatic stress disorder (PTSD) and struggled with the psychological and physiological consequences of rape, and how those around them treated the shamed. The use of sexual assault by partisans as a weapon, punishment, and intimidation in the fight against their opponents remains an understudied issue. These and other aspects of the topic require careful analysis in the future in an interdisciplinary research discourse.

Acknowledgements. We express sincere gratitude to all members of the editorial board for consultations provided during the preparation of the article for publishing.

Funding. The authors received no financial support for the research, authorship, and/or publication of this article.

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The article was received March 30, 2024.

Article recommended for publishing 29/11/2024.

UDC 378.091.12:61](474.362.2)“1950/1990”
DOI 10.24919/2519-058X.33.317452

Kaspars ANTONOVICS

PhD student at the Institute of the History of Medicine, Riga Stradins University, 16 Dzirciema Street, Riga, Latvia, postal code LV-1007 (antonovicskaspars@yahoo.com)

ORCID: 0000-0002-8239-6103

Каспарс АНТОНОВИЧ

аспірант Інституту історії медицини, Ризький університет імені Паула Страдіня, вул. Дзірцема, 16, м. Рига, Латвія, індекс LV-1007 (antonovicskaspars@yahoo.com)

Bibliographic Description of the Article: Antonovics, K. (2024). Foreign business trips of Riga Medical Institute academic staff from 1950 to 1990. *Skhidnoievropeiskyi istorychnyi visnyk [East European Historical Bulletin]*, 33, 197–211. doi: 10.24919/2519-058X.33.317452

**FOREIGN BUSINESS TRIPS OF RIGA MEDICAL INSTITUTE
ACADEMIC STAFF FROM 1950 TO 1990**

Abstract. *The scientific novelty of this study is due to the fact that it presents a new perspective on foreign travels of Riga Medical Institute (RMI) staff during the period from 1950 to 1990, which is an understudied aspect of Latvian medical history. It has been emphasized that international communication, despite bureaucratic and political constraints, played a key role in the professional development of medical staff and the evolution of medical education in Soviet Latvia. This study reveals the impact of different political periods – Stalinism, Khrushchev’s thaw, Brezhnev’s stagnation and the collapse of the Soviet Union – on international academic communication. The purpose of this study is to analyse the foreign academic contacts of RMI faculty members and how their international travels contributed to the development of medical education in Latvia, especially in the context of the political and historical constraints of the Soviet era. The study employs historical and comparative analysis methods and utilizes primary archival documents, including personal files, travel reports, and official documents from the Soviet era from the Latvian State Historical Archives. International trips in different historical periods have been analysed in detail in order to identify factors that influenced their frequency and effectiveness. As a result, the analysis shows that international travel provided significant opportunities for professional development, it was often constrained by political control and limited access to capitalist countries. Despite these challenges, however, RMI staff were exposed to new technologies, scientific knowledge, and work practices in the countries such as the United States, Canada, Japan, Finland, and Switzerland. This experience contributed to the improvement of medical education and scientific development in Latvia. The study suggests that international trips, although limited in number, played a crucial role in the development of professional competencies of RMI faculty. These trips facilitated the exchange of medical knowledge and scientific experience, influencing the development of Latvian medical education during the Soviet period. This study offers a valuable perspective on the role of international academic relations in shaping the medical education system in Soviet Latvia.*

Key words: higher education, scientific and academic staff, internationalisation, primary archival sources, professional training, higher medical institutions.

ЗАКОРДОННІ ВІДРЯДЖЕННЯ ПРОФЕСОРСЬКО-ВИКЛАДАЦЬКОГО СКЛАДУ РИЗЬКОГО МЕДИЧНОГО ІНСТИТУТУ У 1950 – 1990 рр.

Анотація. *Новизна дослідження* полягає у тому, що воно представляє новий погляд на закордонні подорожі викладачів Ризького медичного інституту (РМІ) в період з 1950 до 1990 р., що є маловивченим аспектом латвійської медичної історії. У ньому підкреслюється, що міжнародне спілкування, незважаючи на бюрократичні та політичні обмеження, відіграло ключову роль у професійному розвитку викладачів-медиків та еволюції медичної освіти в радянській Латвії. Це дослідження розкриває вплив різних політичних періодів – сталінізму, хрущовської відлиги, брежнєвського застою та розпаду Радянського Союзу – на міжнародну академічну комунікацію. **Метою дослідження** є аналіз закордонних академічних контактів викладачів РМІ і того, як їхні міжнародні подорожі сприяли розвитку медичної освіти в Латвії, особливо в контексті політичних та історичних обмежень радянської епохи. **Методологія.** У дослідженні застосовуються методи історичного та порівняльного аналізу, а також використовуються первинні архівні документи, зокрема особисті справи, звіти про подорожі та офіційні документи радянської доби з Латвійського державного історичного архіву. Детально розглядаються міжнародні поїздки в різні історичні періоди з метою виявлення факторів, що впливали на їх частоту й ефективність. **Висновки.** У результаті проведеного дослідження встановлено, що міжнародні поїздки надавали значні можливості для професійного розвитку, проте вони часто стримувалися політичним контролем і обмеженням доступом до капіталістичних країн. Однак, незважаючи на ці труднощі, співробітники РМІ мали змогу ознайомитися з новими технологіями, науковими знаннями та методами роботи в таких країнах, як США, Канада, Японія, Фінляндія і Швейцарія. Цей досвід сприяв поліпшенню медичної освіти та наукового розвитку в Латвії. Дослідження показує, що міжнародні поїздки, хоча і обмежені за кількістю, відіграли вирішальну роль у розвитку професійних компетенцій викладачів РМІ. Вони сприяли обміну медичними знаннями та науковим досвідом, впливаючи на розвиток латвійської медичної освіти в радянський період. Це дослідження пропонує цінний погляд на роль міжнародних академічних зв'язків у формуванні системи медичної освіти в радянській Латвії.

Ключові слова: вища освіта, науково-педагогічні працівники, інтернаціоналізація, первинні архівні джерела, професійна підготовка, вищі медичні навчальні заклади.

The Problem Statement. International interaction is a vital component in the professional development of specialists, the advancement of educational institutions, and the growth of a state and its sectors. International cooperation is also important in the development of scientific and pedagogical staff and scientific progress. In the 21st century, there are numerous opportunities for international knowledge exchange, and innovative technologies facilitate this process even online. However, understanding the historical roots of international interaction, when overseas business trips were one of the few methods for knowledge exchange, is crucial for comprehending the establishment of medical education and the development of outstanding professionals. The evolution of higher medical education in Latvia occurred against the backdrop of political events in the Soviet Union, which impacted the development of academic staff and educational institutions and the opportunities for international interaction.

The Review of Recent Research and Publications. The development of academic staff during the Soviet era was researched by Nuriza Kadyralieva (Kadyralieva, 2021), who highlighted the features of research personnel training from 1932 to 1991. The role of international communication in the development of academic staff was covered by Eva Liu and Ethan Hutt (Liu & Hutt, 2021), who analysed the potential of international communication in enhancing diplomatic relations between countries. Yu Chiao Yang and Cnung-Yi Lee (Yang & Lee, 2024), who conducted a comparative analysis of international

exchange programmes, Edward Agbai et al. (Agbai, Agbai & Oko-Jaja, 2024), who did the research on international communication and its impact on global understanding.

During the Soviet era, practical experience and research beneficial to the state were crucial for the development of academic staff. However, the method of professional development through international business trips was limited. This limitation impacted not only the quality of professional training but also the building of relations with other countries. International communication forms essential competencies, new knowledge, and skills of specialists and aids in establishing diplomatic relations. International business trips enhance intercultural understanding, reveal new perspectives for international research, and reduce political tensions between countries.

International business trips were equally significant for medical professionals and academic staff in medical educational institutions, as the medical field requires continuous improvement to safeguard citizens' health and lives. Kala Mehta et al. (Mehta, Petersen, Goodman, et al., 2023) explored the role of international communication in the medical field, researching exchange programmes in the development of medical professionals. The advantages of international interaction for medical professionals include increased motivation to work, acquisition of new experiences applicable in practice, and the formation of knowledge regarding innovative technologies in the medical field and their potential applications.

The characteristics of the educational process and aspects of international interaction in the field of education during the Soviet times were examined by Christopher Markosian et al. (Markosian, Shekherdimian, Badalian, et al., 2020), who explored the problems of medical education in the Soviet Union, Kara Janigan (Janigan, 2020), who determined the features of gender education in the pre-Soviet, Soviet, and post-Soviet eras, Juris Salaks and Kaspars Antonovičs (Salaks & Antonovičs, 2021), who revealed the specifics of scientific international trips of staff from Riga Medical Institute (RMI) in the last decade of the Soviet Union, Brian Lanahan (Lanahan, 2023), who did the research on post-Soviet education features, and Liz Shchepetylnykova and Anatoly Oleksiyenko (Shchepetylnykova & Oleksiyenko, 2024), who analysed de-Sovietisation in higher education and science. Researchers noted that in the Soviet Union, all state sectors were under a strict political control. Political structures also controlled the RMI, a leading medical educational institution, and all international scientific connections between the Soviet Union and Western countries. This affected the quality and accessibility of international interaction for academic staff.

Although the 21st century offers numerous ways and methods of international interaction, the historical roots of international communication should be analysed to understand the aspects and stages of the development of Latvian medical education. This understanding is important for professionals preparing for future professional activities to ensure quality practice. The necessity of examining historical roots in the medical field was studied by Su Hyun Park and Pyeong Man Kim (Park & Kim, 2022), who demonstrated the possibility of developing medical professionalism through the knowledge of medical history, and Ji-Young Park and Seungmann Park (Park & Park, 2023), who analysed methods of teaching the history of medicine in medical educational institutions. Researchers emphasise that acquainting medical students with historical studies, particularly the history of medical education and the challenges encountered during this process, can motivate them to learn, help them understand the importance of their field, and encourage their own scientific inquiries, which demonstrates the necessity of conducting this study.

Analysis of academic sources has demonstrated that the stages of development of medical education in the Soviet Union, particularly in the Latvian Soviet Socialist Republic (SSR), have not been sufficiently studied. Furthermore, aspects of international communication, as one of the primary methods for gaining experience and improving the academic competencies of scientific and pedagogical staff, have not been fully researched. **The purpose** of the study is to analyse the features of international scientific communication among academic staff during the Soviet times. **The objectives** are to conduct a comparative analysis of the opportunities and limitations of international scientific communication across different historical periods and to elucidate the role of international trips in the formation and development of Latvian medical education.

This study is based on historical sources and the chronological and comparative analysis of the obtained data to reveal the aspects of international trips of academic staff during various historical periods of the Soviet era. Uncovering the features of these trips during different historical periods of the Soviet era helped to analyse the changes in international scientific communication and identify factors that hindered its development and those that accelerated the growth of global interaction. To determine the opportunities for international communication in the Soviet Union during different historical periods, the regularity and available methods of international interaction were analysed owing to primary sources (documents, protocols, reports). For example, the document from the Latvian State Historical Archive stored in fund 7427 (description 13, case number 196, certificate No. 132 dated 5.06.1965) was examined, along with two personnel records from the Riga Medical Academy stored in fund 507 of the Latvian State Historical Archive (description 3-2, case number 213 and description 3, case number 605) (RMI Personnel Record Sheet).

Through the analysis of primary sources, data was obtained on international trips in the Latvian SSR during various historical periods and the factors influencing the feasibility and effectiveness of international communication. The main aspects of the international trips of the RMI academic staff were correlated across different historical periods, allowing conclusions to be drawn about the evolution of international scientific communication, its impact on the development of medical education, and the enhancement of professional skills. This provided more detailed information on the influence of the Soviet educational system and international trips of academic staff on the formation of post-Soviet education.

The Research Results.

Foundation and functioning of the RMI and opportunities for international communication

The wartime and post-war years were marked by the decline of Latvian medical education. The medical faculty of the University of Latvia was destroyed, and a substantial number of academic staff and students were either lost or repressed. However, the Soviet Union needed to restore higher medical education institutions. During the war, many medical professionals were lost, the educational process was partially suspended, and its quality was questionable, necessitating the training of a new generation of medical professionals. Thus, in the early 1950s, the medical faculty of the University of Latvia was transformed into a separate higher education institution – the RMI. The establishment of this new medical education institution was accompanied by several challenges, including the destruction of the building, losses among students and academic staff, and the Soviet authorities' rejection of the existing higher education model.

One factor preventing the immediate establishment of a new medical education institution after the end of the war was a poor condition of the damaged building. The

building was gradually repaired under the leadership of P. Stradins, then-dean of the medical faculty. However, the main problem remained the shortage of academic staff and students. While the number of students wishing to enrol in the newly established institute in the restored building gradually increased, the problem of the shortage of academic staff remained unresolved. The Soviet authorities deemed the faculty of the newly formed RMI politically unreliable, and they called into question the academic staff's qualifications and competencies and their ability to teach according to the new requirements and ideology. Academic staff, particularly those in leadership positions, were gradually replaced by new specialists from other regions of the Soviet Union. This method was an attempt by the authorities to implement a system characteristic of Soviet educational institutions: fully controlled and ideological.

The RMI included faculties such as medicine, paediatrics, dentistry, pharmacy, and a faculty of advanced training (Samsons, 1968). The duration of studies varied across different faculties. For instance, the pediatric faculty required six years of study, the dental faculty five years, and the pharmaceutical faculty 4.5 years. The faculty of advanced training was created for medical professionals who wanted to improve their competencies and expand their knowledge in fields such as paediatrics, surgery, and physiotherapy. Enhancing the competencies of academic staff was necessary for several reasons: in the post-war years, the standards for training medical professionals changed, new specialisations emerged, and consequently, new disciplines were introduced, necessitating the upskilling of the teaching staff. The World Health Organization, founded in 1948, also noted the need for the professional development of medical specialists in the post-war years (Ko & Kim, 2012; Li, 2021). The integration of the Soviet Union into the international community and the access of specialists to international interaction could have expanded the opportunities for Soviet medicine and the educational process in medical institutions. However, professional development methods such as global communication, internships in other countries, and foreign trips were not seriously considered then. Trips and internships were available in the cities such as Moscow, Leningrad, or Kyiv. Among the faculty of the RMI there were specialists who had studied medicine in other countries (notably in Germany and Switzerland) and had access to foreign trips, allowing students and other academic staff to be somewhat exposed to global practices and knowledge in the field of medicine. These specialists included R.R. Shuba, who visited Czechoslovakia, France, and Austria, V. Bilenky, V. Kalnberzs, and A. Bezin (Cho & Robert, 2024).

Over time, these academic staff either emigrated or were removed from their positions and replaced by domestic specialists who had obtained higher education diploma in Riga or other universities within the Soviet Union, limiting the acquisition of information about foreign medicine and its possibilities. The authorities closely monitored academic staff, with controls extending beyond professional activities to personal lives. The primary objective of available internships and educational events was not the enhancement of specialists' qualifications or the broadening of their knowledge and skills but rather their ideological re-education, eradicating the influence of the bourgeois past and the capitalist world. Thus, postgraduate studies abroad, which lasted for the period from the 1920s to the 1930s, were replaced by mandatory courses in Moscow and Leningrad. Having an academic title became less essential for professional activities in leadership positions; instead, it was more important for academic staff to endorse the Soviet ideology and to train future specialists within its framework.

Features of international interaction of academic staff at RMI during the Stalinist era (1950 – 1953)

The Stalinist era in the activities of the RMI was characterised by a strict control over academic activities and the Soviet authorities' negative attitude towards the local faculty. Medical and scientific degrees of academic staff were often not recognised, and there was a policy of ideological re-education, which adversely affected their ability to travel abroad. The RMI implemented a policy to educate and train students according to the Soviet standards. One method of maintaining international communication and popularising their scientific ideas beyond the Latvian SSR was publishing research results in medical journals. However, all publications underwent strict censorship, limiting opportunities for scientific communication and the effectiveness of studies. The primary method of exchanging experience was the participation of academic staff from the RMI in medical conferences in Moscow, Leningrad, and Kyiv. Representatives from neighbouring republics could also attend these conferences, but their activities were also controlled, restricted, and censored.

The post-war years, particularly during the Stalinist era, saw limited opportunities for international travel, generally restricted to those with ideologically "correct" backgrounds. The activities of academic staff were subjected to scrutiny and criticism, with Soviet authorities doubting their qualifications, competence, and ability to educate and train youth in the spirit of communism. Consequently, opportunities for international travel for academic purposes were curtailed, and experience exchange was limited to visits to Soviet republics. Exceptions included L. Linovitska, who in 1946 managed to travel to Bulgaria, and Y. Sleydins, who went on an overseas trip to Switzerland in the same year (RMI Personnel Record). However, these cases were precedents in the history of the RMI during that period, as the majority of academic staff had no access to international communication in the Stalinist era. The main methods of maintaining international communication were publications in scientific journals and participation in medical conferences.

Revival of international engagement during the "Khrushchev Thaw" (1953 – 1964)

The Khrushchev Thaw period was characterised by the relaxation of the political regime and an increase in international interaction. One measure aimed at establishing international relations and opening the Soviet Union to the world after the Stalinist era was the Sixth World Festival of Youth and Students, held in 1957 (Koivunen, 2009). The festival resulted in opportunities for cultural exchange with foreigners, understanding other cultures and worldviews, and demonstrating to the world the changes that had taken place in the Soviet Union. During the same period, active educational interaction with representatives from foreign countries took place. For instance, a meeting between specialists from the RMI and a delegation of Latvian doctors from the United States highlighted the positive evaluation of the Soviet Union's free healthcare system and its capabilities.

The new policy of the Soviet Union regarding international cooperation, the relaxation of the ideological political regime, and the high appraisal of the medical sector by foreign colleagues influenced the desire of medical professionals from other countries to engage with Soviet experts. The Soviet academic staff and medical professionals also showed a keen interest in interacting with their foreign counterparts. This broadened their understanding of medicine in other countries and provided information about medical innovations that had previously been dismissed in the Soviet Union. Scientific communication began to develop, and academic staff expressed a desire to travel abroad to gain new knowledge and experience.

However, overseas trips in the late 1950s and early 1960s remained rare. Travel to the so-called "capitalist countries", including Western European nations, North and Latin America, Oceania, and parts of Asia, was particularly restricted. This was due to the disparity between

the scientific advancements of these countries and those of the Soviet Union. The Soviet Union did not utilise certain technologies and methods that were prevalent abroad, and foreign literature was not always accessible to the Soviet scientists, making international communication difficult and not always productive. Falling behind global trends and showcasing this internationally could discredit the Soviet government and its medical sector. Consequently, international communication continued to be controlled and limited. The Soviet authorities criticised capitalist world medicine, emphasising that although foreign scientists had certain achievements in the medical field, these were often expensive and not accessible to all population segments. Furthermore, the Soviet authorities argued that while capitalist countries held the belief in the incurability and irreversibility of many diseases, the socialist society's primary belief was the opposite. With these assertions, the Soviet authorities aimed at proving the superiority of socialist medicine and demonstrate the lack of a pressing need for international communication.

The list of foreign trips from 1955 to 1990 reveals restrictions on travel to capitalist countries. The smallest number of trips occurred during the Khrushchev Thaw. In subsequent years, the number of trips increased, but travel to capitalist countries remained restricted and was fully controlled by the Soviet authorities (Table 1).

Table 1

The number of business trips to socialist and capitalist countries during different historical periods

Years	Business trips to socialist states	Business trips to capitalist states
1955 – 1964	6	10
1965 – 1982	36	4
1983 – 1990	48	21

Source: concluded by the author.

During the Khrushchev Thaw, international communication became more relevant due to the relaxation of the political regime, international cultural events, and the acceptance of international delegations by the Soviet Union. However, medicine in capitalist countries was still criticised, and the possibility of foreign trips remained limited despite the interest in such interaction from both foreign specialists and Soviet scientists and medics. At that time, the main methods of international scientific communication were interactions with delegations from other countries, while obtaining international knowledge and experience through foreign trips was still challenging.

The development of the RMI and the features of international communication of scientific and pedagogical workers during the period of Soviet stagnation (1965 – 1985)

For the Latvian SSR and the RMI, the period of Soviet stagnation was the most stable and active era of the Soviet history in terms of research activities. In the 1960s and 1970s, fields such as pharmaceuticals, microbiology, biochemistry, surgery, molecular biology, oncology, disease prevention, occupational health and hygiene, and the fight against infectious diseases actively developed in the Latvian SSR. From 1966 onwards, scientific activity in the field of medicine intensified: research was conducted, and studies (monographs and articles) were published outside the Soviet Union (Loeber, 1999). Unlike the publications of the Stalinist era, during the period of the Soviet stagnation, studies were subject to less censorship and control, and the state facilitated the conduct of research and the demonstration of its

results. Studies in fields essential for the development of the Soviet Union were particularly encouraged. The prestige of scientists in society increased gradually, research associations were founded, and scientific programmes were developed.

At the RMI, the number of scientific and pedagogical staff, particularly those with doctoral and candidate degrees, increased, the number of departments and areas of training expanded, and the duration of studies changed. Mandatory disciplines were added, including biology and parasitology, biological and analytical chemistry, physics, physical education, physiology, histology, embryology, infectious diseases, microbiology, inorganic chemistry, social hygiene, health care and health care organisation, traumatology and orthopaedics, pharmaceuticals, surgery, and paediatrics. Additional mandatory disciplines included foreign languages, Marxism and Leninism, the history of the Soviet Union and the Communist Party, dialectical and historical materialism, political economy, the “scientific” foundations of communism and atheism, and military training. At that time, Latvian scientists were highly valued, both in the Soviet Union and abroad. Their contributions to medical science and practice were recognised with 500 orders and medals from the Soviet Union, 14 of which were awarded to distinguished scientists of the Latvian SSR and 182 to meritorious doctors of the Ukrainian SSR. The expansion of medical institutions and the promotion of scientific activities allowed Latvian scientists to actively participate in addressing global medical issues. This included research into malignant tumours, leukaemia, atherosclerosis, hepatitis, tuberculosis, rheumatism, allergic diseases, organ and tissue transplantation, resuscitation measures, space medicine, the possibility of creating artificial organs and artificial circulation, and the development of new drugs. Some studies of Latvian scientists were known even outside the Soviet Union.

The early to mid-1960s saw an expansion of opportunities for international communication for academic staff, which also applied to specialists at the RMI. Scientific trips to institutes in Moscow and Leningrad became more regular, and foreign trips became more accessible to a wider category of academic staff. Exchange trips of foreign researchers to the Latvian SSR and vice versa – Latvian researchers to foreign countries – were initiated. Although foreign trips became more accessible, they were accompanied by bureaucratic challenges. For a trip abroad, it was necessary to write an application addressed to the faculty dean requesting permission for a scientific trip, specifying the purpose of the trip, the destination (specific country), and the duration of the trip. The application was reviewed by a responsible person, such as the rector, and approved with a resolution. Furthermore, the academic staff member had to obtain a foreign passport issued by the Latvian SSR and a visa. Despite bureaucratic difficulties and political restrictions, the academic staff of the RMI gained access to foreign trips, as they had strategic significance for Soviet medicine. The experience gained was integrated into Soviet medicine, particularly in the military field (Priedīte, 1997).

During the period of stagnation, the scientific activities of the RMI intensified. The number of departments increased, resulting in a higher number of students and academic staff. The teaching staff received well-deserved academic titles and degrees and were given the opportunity to travel abroad to exchange experiences and gain new knowledge, although political and bureaucratic difficulties still accompanied the process.

International scientific communication during the dissolution of the Soviet Union and the republic's restoration (1985 – 1990)

In the early 1980s, the Soviet “Iron Curtain” could not withstand the competition from capitalist countries and acknowledged their achievements in the scientific and technical fields, particularly in the medical sphere. The quality of medical education at the beginning

of the 1980s was significantly better than in previous periods. However, Soviet medical professionals were not competitive in the international labour market (Loeber, 1999).

Foreign countries actively developed innovative technologies that improved disease prevention and treatment and modernised medical education, hospitals, and approaches to public health. In contrast, the scientific and technical process in the medical field in the Soviet Union had hardly developed and had not undergone significant changes in recent years. This forced the Soviet authorities to recognise the achievements of capitalist countries and open access to foreign trips, particularly to capitalist states, to gain the necessary experience for the Soviet Union. Among the countries to which academic staff travelled for scientific trips were Cuba, Vietnam, Finland, the Netherlands, Switzerland, Japan, and later the USA, Canada, Italy, France, and Spain. Although foreign assignments became more accessible, and the Soviet government facilitated international communication, the process continued to be accompanied by political and bureaucratic difficulties. However, within the RMI, there was an increasing inclination towards publishing in international journals and recognised collections abroad. Moreover, books by foreign specialists, translated into languages accessible to the Soviet readers, began to appear, and conversely, the works of Soviet specialists were translated into English. In the late 1980s, academic staff members had the opportunity to intern abroad for the first time.

The situation changed after 1990 when the Soviet Union collapsed, and Latvia regained its independence. While the presence of international scientific representations steadily increased, the advancement of research activity at the RMI was constrained by a lack of material and technical resources and the need to establish connections with other countries. In 1990, the RMI was renamed the Latvian Medical Academy, which gained international recognition thanks to the high achievements in medicine by its academic staff, characterised by high-quality work, responsibility, and the presence of global experience gained through international scientific communication (Jain et al., 2023). It is advisable to analyse the characteristics of international communication of the RMI academic staff from 1950 to 1990 to understand the development of global interaction, academic staff, and the educational institution (Table 2).

Throughout the history of the Latvian SSR, medical education and opportunities for international collaboration underwent regular changes. Beginning with the post-war years and the Stalinist era, and continuing through the dissolution of the Soviet Union, interest in international interaction and research activities gradually increased, and the possibilities for fulfilling these opportunities expanded. Opportunities for international communication included: publications in international journals, interactions with representatives of international delegations, short-term business trips and conferences, and longer-term internships, which positively influenced the experience of Soviet medical professionals and the medical field in general.

Many outstanding professionals were denied the opportunity to travel abroad. Despite significant achievements in scientific and educational activities, well-developed competencies, extensive experience, and knowledge of foreign languages, many specialists were refused international travel due to political and ideological unreliability in the eyes of the Soviet authorities. The criticism of the medical field in capitalist countries and the restrictions on gaining international experience negatively impacted the development of Soviet medicine and, as a result, the development of 21st-century medicine in post-Soviet countries. However, during the Soviet stagnation and the dissolution of the Soviet Union, international communication intensified as the authorities recognised the necessity of gaining foreign colleagues' experience for the development of the state and the medical field.

Table 2

Features of international scientific communication of RMI staff in different periods

Period	Opportunities for international scientific communication	Restrictions on international scientific communication
“Stalinist Era” (1950 – 1953)	<ul style="list-style-type: none"> – publications in medical journals; – participation in medical conferences in Moscow, Leningrad, and Kyiv. 	<ul style="list-style-type: none"> – all publications were strictly censored; – conferences were controlled and limited, with typically only representatives from neighbouring republics participating; – only emigrants with an ideologically “correct” background could travel abroad.
“Khrushchev Thaw” (1953 – 1964)	<ul style="list-style-type: none"> – international events held within the Soviet Union; – communication with representatives of delegations from other countries; – access to information from Western literature. 	<ul style="list-style-type: none"> – the medical field of Western countries was criticised; – foreign literature was very limited and censored; – international travel opportunities remained restricted, available only to academic staff with an ideologically “correct” background.
Period of Soviet stagnation (1965 – 1985)	<ul style="list-style-type: none"> – broader opportunities for international travel for a wider range of academic staff. 	<ul style="list-style-type: none"> – international travel was accompanied by political and bureaucratic difficulties.
Period of the Soviet Union dissolution	<ul style="list-style-type: none"> – greater access to international travel for more academic staff; – expanded list of countries for international travel; – increased number of foreign experts’ books translated into languages accessible to Soviet specialists; – Soviet, including Latvian, specialists’ works were translated into foreign languages; – expanded opportunities for publication in international collections; – opportunities for internships abroad were opened. 	<ul style="list-style-type: none"> – bureaucratic difficulties in travelling abroad for scientific purposes.

Source: concluded by the author.

During international trips, specialists had the opportunity not only to gain new knowledge and experience but also to become acquainted with the culture and traditions of other countries, observe the higher medical education system of other states from within, learn about innovative medical technologies and their practical application, and integrate into the international scientific community. Moreover, international trips were a means of establishing international relations and enhancing the prestige of Soviet medical education on the international level. Academic staff’s international business trips were the foundation for the development of Latvian medical education in several areas, including improving the quality of education, advancing science, and fostering technical progress.

International trips immensely enhanced the quality of Soviet medical education. Academic staff from the RMI had the opportunity to observe teaching processes in foreign educational

institutions, adopt innovative methods and teaching techniques, and suggest changes to existing curricula. Soviet students gained access to information about international scientific achievements and developments, which influenced their preparation for and conduct of professional activities. The international trips of academic staff also facilitated the development of science. The commencement of international scientific communication and the integration of Soviet academic personnel were pivotal in the creation of research programmes and scientific associations in the Soviet Union. International scientific communication spurred the initiation of domestic research and the creation of indigenous developments, many of which became the foundation for further analysis in the former Soviet states.

International trips by academic staff contributed to technological progress. While innovative technologies were actively utilised abroad in the medical field, in disease prevention and treatment, and in research, the Soviet Union was not competitive in this aspect. The Soviet authorities had to acknowledge the backwardness of scientific and technological progress in the medical field and opened up access to international trips, which spurred technological progress: the introduction of new methods and technologies in the medical field and the development of new approaches, many of which are still used today. These international trips and other forms of international scientific communication allowed RMI specialists to gain new experience and introduce new methods and technologies into the medical field of the Soviet Union. Current specialists have inherited some of these methods and technologies and serve as the basis for 21st-century research and scientific pursuits.

The Soviet system of higher medical education and the role of international travels by the RMI academic staff in the development of Latvian medical education

In the post-war years, the medical field became a priority for the Soviet Union, which led to the development of higher medical education and the preparation of academic staff for quality teaching and conducting their own scientific research for the benefit of the state. International interaction was an effective method for preparing the teaching staff to conduct the educational process and research work, as the technological advance of Western countries was much faster. Despite this, for a long period (from 1950 to 1965), international interaction, particularly scientific travels abroad, was inaccessible to most academic staff, limiting the exchange of experience. From 1965 until the beginning of the dissolution of the Soviet Union (1990 – 1991), international interaction intensified, and opportunities for foreign travel became available to a wider circle of academic staff, which influenced the development of Latvian medical education and the scientific and technological progress of the Soviet Union.

In his study of medical education, J. Vaughn (1970) noted that the development of the medical field in the post-war years was important for the Soviet Union, which is consistent with the results of this study. According to the researcher's findings, there were several reasons for this. Firstly, the role of medics in the society increased: wartime demonstrated that having qualified medical assistance was an advantage on the battlefield. Secondly, a large number of medics were lost, necessitating the training of new, qualified, and modern medical personnel. There was an increased need to create new medical education institutions. In the study of the establishment of medical academies in the 1950s, P. Svobodný (2018) concluded that at the beginning of the 1950s, many medical faculties were transformed into separate medical educational institutions to ensure quality teaching, conduct research, and train competitive specialists, which aligns with the findings of this study.

However, the results of this study demonstrated that the educational process and international interaction in these newly established institutions were controlled by the Soviet

authorities, making the training of future medical professionals less effective. D. Barr and R. Schmid (1996), who examined medical education in the Soviet Union, arrived at similar conclusions. The researchers noted that admission to medical educational institutions in the Soviet Union, the curriculum, and pedagogical policy were controlled by Soviet authorities and had to conform to Soviet ideology, which was the main drawback of the Soviet education system, limiting the development of academic staff and the training of future professionals, restricting opportunities to acquire all necessary knowledge and skills. Additional drawbacks of the Soviet educational system, according to researchers, included early specialisation, an excess of specialists, and the need to ensure equal opportunities for all medical professionals. In 21st-century medical education, specialists receive basic knowledge in the early years of study and later choose a narrow specialisation in senior years. In the Soviet medical education system, students had to choose their specialisation from the first year, which led to a lack of basic knowledge and skills, difficulties in training and preparing specialists. Moreover, due to the active development of medical education, the number of graduates was much higher than the state's needs, resulting in some medics being unable to find work in their field or being sent to other cities or countries within the union. There were also issues of equal opportunities for medical professionals: medics from remote regions, certain social or ethnic groups had limited opportunities for professional activity and development. Umsunai Omurbekova, who analysed the educational and cultural policy of the Soviet Union, reached similar conclusions. According to her research, a substantial part of the educational process in the Soviet Union was aimed at the communist upbringing of academic staff and future medics in line with Soviet ideology rather than acquiring substantial medical knowledge and improving qualifications, which aligns with the results of this study (Omurbekova, 2023).

A significant role in the communist indoctrination of future professionals was played by academic staff. In examining the state of education and science in the healthcare sector during and after the collapse of the Soviet Union, George Gotsadze et al. (Gotsadze, Mirzikashvili, Kekelidze et al., 2022) concluded that Soviet ideology restricted the freedom of academic staff, prohibited international communication, and limited access to international literature to impose its vision on the educational and scientific process. As the study of foreign languages was not mandatory for a certain period and only began to flourish during the Soviet stagnation period, international communication and access to international research and its results were restricted. This had a negative impact on higher medical education and the training of future professionals.

The onset of international interaction and the development of foreign missions marked the beginning of changes in the higher medical education system of the Soviet Union. This aligns with the findings of Yu Jiao Zhang et al. (Zhang, Cao, Xia et al., 2022), who explored aspects of Chinese students' education in the Soviet Union; Nguyen Thi Phuc (2023), who examined the partnership between Vietnam and the Soviet Union; and Chengzhang Zou (Zou, 2023), who interpreted Soviet-Chinese relations. These researchers noted that after the political regime relaxed and international interaction began, interest in the Soviet Union, particularly in the medical and educational sectors, gradually increased. The number of specialists sent to study in medical educational institutions in the Soviet Union grew, which corresponds with the results of this paper. Similarly, the number of Soviet specialists sent for training and international missions to other countries, including the United States, Cuba, Vietnam, Finland, the Netherlands, Switzerland, Japan, Canada, Italy, France, and Spain, increased. There was also a rise in publications in international journals and an increase in international

conferences, forums, and congresses. However, foreign missions remained the primary and most effective method of international communication.

RMI, as a leading institution of higher medical education in the Soviet Union, played a crucial role in the development of both Latvian and Soviet medical education. The opportunities for international scientific communication evolved alongside the broader changes within Soviet society. Despite the political, ideological, and bureaucratic challenges that accompanied foreign assignments throughout various periods, the persistence, experience, and dedication of the academic staff at RMI resulted in enhanced educational quality, technological advancement, and the establishment of a foundation for the future development of medical education.

The Conclusions. In this study there have been analysed the characteristics of international communication among the academic staff of RMI between 1950 and 1990. It has been determined that international interaction is vital for both academic staff and the state. Academic staff benefit by gaining new experiences and improving their knowledge and skills. The state, in turn, can explore new areas in international research and reduce tensions in international relations by establishing diplomatic connections. RMI was a leading medical educational institution in the Soviet Union, and the academic staff had access to foreign assignments. However, these opportunities came with certain restrictions. From 1950 to 1990, all branches of the Soviet Union, including the education sector, were subject to a strict control. Foreign business trips were available to talented University teachers and promising scientists with impeccable reputations and the necessary political and ideological perception.

In the era of Stalinism (1950 – 1953), foreign assignments were available only to immigrants with impeccable political reputations, and the activities of academic staff were subject to scrutiny. Some immigrants had access to foreign travel among the teaching staff of RMI. However, the Soviet authorities believed that the teaching staff of RMI were incapable of educating future generations in the spirit of communist ideology, which led to their gradual removal from their positions. During the “Khrushchev Thaw” (1953 – 1964), the political regime was relaxed, and the Soviet Union resumed international communication. RMI hosted delegations from leading world powers, including the United States, which contributed to the acquisition of new experiences, knowledge, and insights into medical education. An increase in the number of academic staff at RMI, new departments, and specialisations marked the period of Soviet stagnation (1965 – 1985). These changes in the educational process promoted the intensification of international communication: foreign assignments became more accessible, short-term exchange programmes were established, although political and bureaucratic challenges still accompanied foreign travel. During the collapse of the Soviet Union (1985 – 1990), the Soviet authorities acknowledged the backwardness in technological progress in medicine and the necessity of exchanging experiences with foreign scientists. Exchange programmes, internships, and research programmes were developed.

The collapse of the Soviet Union and the restoration of the independence of Latvia were characterised by an increase in international scientific communication, particularly in terms of foreign assignments. Despite the lack of modern material and technical resources in Latvia, the foundation established during the Soviet era became the basis for the further development of medical education. RMI, renamed the Latvian Medical Academy in 1990, is now Riga Stradins University. Therefore, foreign assignments contributed to the improvement of the educational and scientific activities of RMI, promoting the development of science and technological progress, which had a positive impact on the medical field in the Latvian SSR and the Soviet Union in general.

The limitations of this study may include the inaccuracy or distortion of historical data in the sources analysed. Prospects for further analysis could include the development of medical education in independent Latvia since 1991 and the role of international interaction in this process.

Funding. The author did not receive any financial support for the research, authorship and/or publication of this article.

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The article was received April 02, 2024.

Article recommended for publishing 29/11/2024.

UDC 94(477):352.07]:37.014.3(477)“199/20”
DOI 10.24919/2519-058X.33.317475

Svitlana MAKARETS

PhD (History), Associate Professor of the Department of Political Science, History and Philosophy, Poltava State Agrarian University, 1/3 Skovorody Street, Poltava, Ukraine, postal code 36003 (svitlana.makarets@pdau.edu.ua)

ORCID: 0000-0002-6844-261X

ResearcherID: Q-7518-2016

Oleksiy KAVYLIN

PhD (Political Sciences), Associate Professor of the Department of Public Administration and Land Cadastre, Classical Private University, 70-b University Street, Zaporizhzhia, Ukraine, postal code 69002 (diplomets@gmail.com)

ORCID: 0009-0001-1857-3099

ResearcherID: co/rid93977

Світлана МАКАРЕЦЬ

кандидатка історичних наук, доцентка кафедри політології, історії і філософії, Полтавський державний аграрний університет, вул. Сковороди, 1/3, м. Полтава, Україна, індекс 36003 (svitlana.makarets@pdau.edu.ua)

Олексій КАВИЛИН

кандидат політичних наук, доцент кафедри публічного управління та земельного кадастру, Класичний приватний університет, вул. Університетська, 70-б, м. Запоріжжя, Україна, індекс 69002 (diplomets@gmail.com)

Bibliographic Description of the Article: Makarets, S., & Kavylin, O. (2024). The Role of the Local Self-government in the Development of the Education System of Ukraine (at the end of the 20th – the beginning of the 21st centuries). *Skhidnoievropeiskyi istorychnyi visnyk [East European Historical Bulletin]*, 33, 212–226. doi: 10.24919/2519-058X.33.317475

**THE ROLE OF THE LOCAL SELF-GOVERNMENT IN THE DEVELOPMENT
OF THE EDUCATION SYSTEM OF UKRAINE
(at the end of the 20th – the beginning of the 21st centuries)**

Abstract. *The purpose of the research is to determine the influence and significance of the local governments in the development of education in Ukraine from 1991 to 2023. The research methodology is based on the principles of historicism, authorial objectivity, multifactoriality, historical-genetic, historical-typological and historic-systemic methods. The Scientific Novelty. The impact of local government reforms on the education system in Ukraine in the late 20th and early 21st centuries was studied for the first time. The Conclusions. Therefore, the history of local government educational policy in independent Ukraine can be divided into three periods. The first one (1991 – 1997) was a period of uncertainty regarding the competencies and powers of local government bodies in the field of education due to the variability of legislation, fluctuations between community and state models of local self-government, as well as a severe economic crisis in the country. The second one (1997 – 2014)*

was the period of establishment of the state-public model of local self-government, the distribution of functions for the management, financing and control of education between state authorities and local governments, and the growth of the role of local governments in financing education, which covered 60% of expenditures on educational institutions. At the same time, education funding remained low due to low local budget revenues. The third one (from 2014) is the period of decentralization (administrative), educational, and budgetary reforms, as a result of which the issue of education has become one of the central issues in the activities of local government bodies. This period is characterized by increased investment in education, modernization of the education network, improving the quality and accessibility of education, and ensuring its inclusiveness. Local governments form strategic objectives for the development of education as one of the main ones for the further development of territorial communities, and therefore plan significant expenditures on education – 40–60% of their budgets.

Key words: local self-government, decentralization reform, education reform, educational policy, local self-government development model.

РОЛЬ ОРГАНІВ МІСЦЕВОГО САМОВРЯДУВАННЯ У РОЗБУДОВІ СИСТЕМИ ОСВІТИ УКРАЇНИ (кінець ХХ – початок ХХІ ст.)

Анотація. *Мета дослідження* – з'ясувати вплив і значення органів місцевого самоврядування у розбудові освіти в Україні від 1991 до 2023 р. **Методологія дослідження** спирається на принципи історизму, авторської об'єктивності, багатофакторності, а також на загальнонаукові та спеціально-історичні методи (історико-генетичний, історико-типологічний, історико-системний). **Наукова новизна:** вперше досліджено вплив реформ місцевого самоврядування на систему освіти в Україні кінця ХХ – початку ХХІ ст. **Висновки.** Отже, історію освітньої політики місцевого самоврядування у незалежній Україні можна поділити на три періоди. *Перший (1991 – 1997) – період невизначеності щодо компетентностей і повноважень органів місцевого самоврядування у сфері освіти з огляду на змінюваність законодавства, коливання між громадянською і державницькою моделями місцевого самоврядування, а також важкою економічною кризою в державі. Другий (1997 – 2014) – період утвердження державницько-громадянської моделі місцевого самоврядування, розподіл функцій щодо управління, фінансування та контролю освіти між органами державної влади і самоврядуванням, зростанням ролі місцевого самоврядування у фінансуванні освіти, які покривали 60 % видатків на заклади освіти. При цьому фінансування освіти залишалося низьким через низькі доходи місцевих бюджетів. Третій (від 2014 р.) – період проведення децентралізаційної (адміністративної), освітньої, бюджетної реформ, у результаті чого питання освіти перетворилося на одне із центральних у діяльності органів місцевого самоврядування. Цей період характеризується зростанням капіталовкладень в освіту, модернізацію освітньої мережі, підвищенням якості і доступності освіти, забезпечення її інклюзивності. Органи місцевого самоврядування формують стратегічні завдання розвитку освіти як одні з основних для подальшого розвитку територіальних громад, а тому планують видатки на освіту у суттєвих розмірах – 40–60 % від своїх бюджетів.*

Ключові слова: місцеве самоврядування, реформа децентралізації, реформа освіти, освітня політика, модель розвитку місцевого самоврядування.

The Problem Statement. The study on the history of the local self-government in Ukraine, as in other countries of the world, involves clarifying its role in organizing the functioning of the main components of community life: economic, administrative, educational, cultural. There is the complexity of conducting this study in several aspects: first of all, since 1991, the local self-government in Ukraine has been experiencing complex transformations associated with constant changes in legislation, a difficult political, economic and financial situation, the implementation of reforms, as well as Russia's hybrid and conventional war against Ukraine; second of all, there is lack of a complete source base, since the vast majority of necessary documents are still in the archives of local self-government bodies and have not been transferred to the central state archives; third of all, there are contradictory conclusions

and assessments of experts on the issues of the local self-government in Ukraine, which are guided by irrelevant methods and operate on selective facts. It should be noted that there are no studies on the activities of the local self-government bodies in independent Ukraine regarding the development of the education sector.

The Review of the Recent Research and Publications. The issue on the local self-government reform in Ukraine attracts the attention of the Ukrainian and foreign scholars. The legal and administrative aspects of the functioning of local self-government have been particularly actively studied, which is reflected in the studies by Anatoliy Tkachuk, Robert Aghanoff, Trevor Braun (Tkachuk, Ahranoff & Braun, 1997), Oleksandr Ievtushenko (Ievtushenko, 2013), Yuriy Kovbasiuk (Kovbasiuk, 2014), Anatoliy Matviyenko (Matviyenko, 2015), Tetiana Baranovska (Baranovska, 2016), Larysa Olenkovska (Olenkovska, 2016), Olena Maidanyk (Maidanyk, 2018), and the others. Iryna Drobush studied the social function of local self-government in Ukraine (Drobush, 2017). The local self-government in Ukraine as a subject of education management is described in the monograph by Natalia Vokolova (Volkova, 2014). The historical development of local self-government was analysed by Vitaliy Zablotskyi (Zablotskyi, 2013), Mykola Haliv, Olena Nevmerzhytska, Vasyl Ilnytskyi (Haliv & Nevmerzhytska, 2018; Haliv & Ilnytskyi, 2019), Dmytro Kruhliak (Kruhliak, 2020), Anatoliy Kalyayev and Artem Solomaha (Kalyayev & Solomaha, 2024), and the authors of the monograph “Local self-government in Ukraine (XX – early XXI centuries). Western lands” (Romaniuk, 2023). A historical and comparative analysis of the Polish and the Ukrainian local self-government reforms was carried out by Tamara Sharavara and Anastasia Nekriach (Sharavara & Nekriach, 2023). Some methodological aspects of the issue under study are covered in the studies by Mykola Haliv and Vasyl Ilnytskyi (Haliv & Ilnytskyi, 2021; Haliv & Ilnytskyi, 2023). We should mention the expert analysis of the decentralization reform in Ukraine among the foreign studies, which was conducted by specialists from the Danish Institute for International Studies (Lindegaard & Webster, 2018). Taking into consideration the above-mentioned, in historiography there are no studies on the role of the Ukrainian local self-government in the development of education, apart from the work written by N. Volkova.

The purpose of the research is to determine the influence and significance of the local governments in the development of education in Ukraine from 1991 to 2023.

The Research Results. The issue on the role of local self-government bodies in the education system development is closely connected with the issue of expanding the competencies and powers of local self-government in Ukraine. Since the proclamation of independence in 1991, Ukraine has been undergoing the gradual establishment of a local self-government system. The country witnessed a struggle and coexistence of two models of the local self-government: the community-based and state-driven models over nearly thirty years. The first model defines the community as the social foundation of the local authority (Drobush, 2017, pp. 59–60). The second model involves decentralization of the state power and the involvement of the community in carrying out some state functions (Maidanyk, 2018, pp. 56–57).

The first regulatory legal act, which regulated the powers of the local self-government in independent Ukraine was the Law “On Local Councils of People’s Deputies of the Ukrainian SSR and Local Self-Government” (Law of Ukraine, 1990), which was adopted in 1990 by the democratically elected Verkhovna Rada. According to a lawyer Olena Maidanyk, the above-mentioned law stated the use of the state-driven model of local self-government

(Maidanyk, 2018, p. 56). According to the law, local self-government bodies were responsible for financing from the local budget the costs associated with maintaining the public educational institutions and managing them. It was specified in one of the articles that local self-government bodies should “increase, within the available funds, the expenditure norms” for maintaining public educational institutions (Zakon Ukrainy, 1990). The term “public educational institutions” referred to preschool establishments, primary, basic, and secondary schools, as well as extracurricular institutions (such as music, art, sports schools, etc.).

In March of 1992, the Ukrainian Parliament adopted a new version of the Law “On Local Councils of People’s Deputies and Local and Regional Self-Government”, which marked the transition to a community-based concept of local self-government (Maidanyk, 2018, p. 56). Although there wasn’t much on the functions of the local self-government bodies in the field of education. However, the Executive Committees of the local Councils were given the right to organize methodological assistance to schools, plan the development of a network of schools and preschool and after-school institutions, based on the standards of provision in the field of public education (Zakon Ukrainy, 1992). In the same year, the institution of Representative of the President was introduced in Ukraine at the levels of districts, regions, cities of Kyiv and Sevastopil (and districts of these cities). The Representative of the President of Ukraine performed the functions of the head of the state administration.

At that time, the Law “On Education” was in force in Ukraine, adopted on May 23, 1991. According to it, the state policy in the field of education was determined by the Verkhovna Rada of Ukraine and implemented by the state executive authorities and local self-government bodies. The state executive authorities and the local self-government bodies were given the opportunity to manage and control the educational institutions’ activities, ensure the development of the network of educational institutions, strengthen their material base, provide social protection for education workers, children, students and youth, organize children preschool and school age registration (Zakon Ukrainy, 1991).

The Verkhovna Rada of Ukraine adopted the law “On the Formation of Local Authorities and Self-Government” in February of 1994 (Zakon Ukrainy, 1994). It did not address education issues, however, according to O. Maidanyk, this law returned to the statist model of the local self-government (Maidanyk, 2018, p. 56). The Constitution of Ukraine, approved on June 28, 1996, guaranteed the activities of local self-government, although some articles laid obstacles to further reform of the local self-government system, in particular regarding the budget system and existence of regional and district councils (Tkachuk, Ahranoff & Braun, 1997, p. 145). In fact, the Constitution affirmed the statist model of local self-government.

Ukraine ratified the European Charter of the Local Self-Government in 1997 after joining the Council of Europe in 1995 (Yevropeiska khartiia, 1985). On May 21, 1997, the Law “On Local Self-Government” (Zakon Ukrainy, 1997) was adopted. The “territorial community of villages, settlements, cities” was recognized the primary subject of local self-government, the main holder of its functions and powers. The representative bodies at the District and Region levels remained Councils, and their executive bodies were the local state administrations. The norms of the law provided for the independence of the local government bodies (along with the formation of the budget), however, de facto the sphere of the local government was clearly regulated, in particular, District and Regional Councils were preserved as an element of management in the regions, while the filling and execution of budgets remained within the competence of the local state administrations (Mistseve samovriaduvannia v Ukraini, 2023, p. 572).

The new law defined the powers of the local self-government bodies (executive bodies of village, settlement and city Councils) in the field of education: management of educational institutions; ensuring the acquisition of complete general secondary, vocational (vocational and technical), professional pre-higher and higher education in state and municipal educational institutions, creating the necessary conditions for the education of children and youth, development of their abilities; promoting the activities of preschool and out-of-school educational institutions, children's, youth and scientific and educational associations, youth centers; organizing medical care and nutrition in educational institutions (Zakon Ukrainy, 1997). The Law "On Local State Administrations" imposed on the local state authorities the obligation to take measures in order to preserve the educational institutions' network (Zakon Ukrainy, 1999). In 1997 and 2005, there were made attempts to develop a legislative framework for implementing territorial and administrative reform in Ukraine, however, political processes and expert conclusions hindered their implementation.

The territorial communities' right to act as public owners of the financial resources mobilised to local budgets as their own revenues is guaranteed in the Ukrainian Constitution and laws. At the same time, local self-government had the right to receive financial support from the state, especially in the implementation of delegated powers. According to the Budget Code of Ukraine, there are the following revenue sources for the local budgets: the tax on the profit of enterprises and financial institutions of municipal ownership, part of the net profit (income) of municipal unitary enterprises and associations, local taxes and fees. However, the share of the local taxes and fees in the local budgets did not exceed 2,3% in Ukraine (Yakymchuk, 2013, pp. 297–298).

The budgeting of Ukraine until 2014, when the decentralization reform was launched, was characterized by a high level of financial resources concentration in the state budget, which reduced the importance of the local budgets and the ability of the local governments to solve the local problems important for the territorial communities. Eventually, the experts stated that due to the lack of the financial resources caused by the limited composition of the local government budget revenues and their annual significant underfunding (in terms of meeting the approved amounts of subsidies and subventions), the financial independence of the local governments was called into question (Yakymchuk, 2013, p. 301).

At that time, the Ukrainian education development took place under the conditions of the contradictory influences of political, economic, cultural and internal factors. According to Natalia Volkova, the main contradictory issues were: inconsistency, insufficient scientific justification of the state policy in the field of education; the lack of monitoring regarding the quality of the carried out reforms, a low level of public participation in reforming education, its management, and assessment of its quality; prolonged economic and environmental crises; demographic changes (declining birth rate, migration, depopulation of settlements); the crisis of the family as a social institution, which led to a deficit of responsible parenthood, the conflict between generations of adults and children; almost unregulated development of the educational institutions' network by the state and local authorities, which led to the decline of some levels of education (preschool, vocational, postgraduate) and did not ensure the quality of specialists' training at other levels (higher education, state and non-state sectors of which grew in the part of the educational institutions of III-IV levels of accreditation rapidly); imbalance of quantitative and qualitative indicators of vocational and higher education with the needs of economy and labour market; the gap in time and content of modernization processes in general secondary and higher education, which led to the unpreparedness of

pedagogical, scientific and pedagogical and managerial personnel to respond to innovations in a timely and adequate manner. The above-mentioned issues jeopardized realization of the most important right of every citizen – to have equal and fair access to high-quality and effective education according to their needs and capabilities (Volkova, 2014, p. 55).

Taking into consideration difficult economic situation and limited financial capabilities by laws and codes, local governments in Ukraine were unable to finance the network of educational institutions fully. There was a significant reduction in the number of preschool, primary and secondary educational institutions, during the first two decades of Ukraine's independence. Hence, the network of preschool institutions in Ukraine decreased by almost 40%; the number of children attending preschool institutions – by 55,5 in 1990 – 2006%; the coverage rate of preschool children decreased from 57% in 1990 to 40% in 2000, increasing to 53% in 2006 (Doshkilni navchalni zaklady, 2010). The statistical data state that there were 2,3 thousand institutions in Ukraine in 1991, 1, 2 thousand institutions – in 2000, 1,1 thousand preschool education institutions – in 2010. The year of the 2005 became critical, as there were only functioning only 1040 preschool institutions in Ukraine (Yak zminylasia osvita v Ukraini, 2011).

The network of preschool educational institutions reduced particularly in villages. The number of institutions decreased by 32,6%, and the number of places in those institutions decreased by 54%; the coverage rate of children with preschool education fell off by more than a third – from 43% to 29%. In cities, the number of preschool educational institutions decreased by 44,5%; the number of places doubled; the coverage rate increased from 64% to 66% (Doshkilni navchalni zaklady, 2010). The reduction in the number of preschool educational institutions in Ukraine led to an increase in their workload. This indicator exceeds the national average in almost 50% of regions – 112 children per 100 places. It should be noted that it was applied to the cities, where the workload of preschool educational institutions was 123 children per 100 places in 2010. In contrast, there were 83 children per 100 places in the rural areas (Volkova, 2014, p. 57).

According to N. Volkova, the reduction of the preschool education network is due to numerous socio-economic factors. First of all, there was a decline in production, which led to the forced transfer of departmental (those operating at enterprises, institutions and organizations) preschool institutions to local government bodies in the early 1990s, and the latter were unable to provide a sufficient level of their financing. Second of all, there was insufficient budget financing of education in general. Third of all, due to a low level of income diverse families could not pay for the children's education in preschool institutions. Fourth of all, there was a high level of unemployment among young people, which created conditions, when young families were able to raise children without preschool institutions (Volkova, 2014, c. 57).

The situation was somewhat different in the sphere of general secondary education institutions. The network of general schools decreased in 1990 – 2010, although 99% of them were municipally owned. To make matters worse, the network of preschool institutions decreased rapidly. Hence, in 1995/94 academic year, there were 22,255 general schools in Ukraine, in 2009/10 academic year – 20,576 (Osaulenko, 2010, p. 444). Thus, 1,679 schools ceased to exist over these 15 years. Although the number of school-age children also decreased. Thus, there were 7,143 thousand people, at the beginning of 1990/91 academic year, and by 2010/11 academic year – 4,299 thousand people, i.e. 1,7 times less. As of the 2010/11 academic year, the teacher-student ratio was 1:8,4 (compared to 1:13,3 in the

1990/91 academic year) (Osaulenko, 2010, p. 444; Zahalnoosvitni navchalni zaklady, 2010). If the decrease in the number of students was a consequence of demographic processes and population migration, then the decrease in the number of educational institutions maintained by local governments was the consequence of a low financial capacity of local governments.

Since the 1990s, the number of vocational and technical education institutions has been decreasing. Thus, the number of vocational technical schools and colleges under the management of the Ministry for Education and Science of Ukraine has decreased from 742 to 505 educational institutions over the 20 years of independence. The number of students has more than halved – from 757 to 361 thousand people (Як змінилася освіта, 2011). A significant part of vocational and technical educational institutions were under the management of other ministries. At the beginning of the 2010/11 academic year the total number of vocational and technical educational institutions was 976 state institutions that trained specialists in 342 professions (492 specialties) in Ukraine. The number of private institutions as of the beginning of 2010 was 924 units with a student population of 88.9 thousand people (Volkova, 2014, pp. 59–60). During the same time, the number of higher education institutions increased dramatically. If in 1990 in Ukraine there were 149 institutes and universities, then in 2010 there were 349 institutes and universities. At the same time, the number of students increased from 881 thousand to 2,139 thousand (Yak zminylasia osvita, 2011). The majority of vocational (vocational and technical) and higher education institutions were state-owned. However, in the 1990s, private and, importantly, municipal institutions of vocational and higher education began to appear. As of 2023, 29 municipal institutions of higher education operated in Ukraine (Dopovid pro yakist vyshchoi osvity, 2024). In Ukraine, perhaps the most famous of them is Borys Hrinchenko Kyiv University, which was founded in 2002.

Financing of education in Ukraine by the state budget and local budgets in 2002 – 2009 is presented in Table 1.

Year	Total budget (mln. hrn.)	State budget expenditures		Local budget expenditures	
		mln. UAH	%	mln. UAH	%
2002	12269,0	4989,3	40,7	7279,7	59,3
2003	14977,7	5735,7	38,3	9242,0	61,7
2004	18333,2	7200,0	39,3	11133,2	60,7
2005	26801,8	9932,8	37,1	16869,0	62,9
2006	33785,0	12122,1	35,9	21662,9	64,1
2007	44333,6	15149,7	34,2	29183,9	65,8
2008	60959,4	21554,3	35,4	39405,1	64,6
2009	66773,6	23925,7	35,8	42847,9	64,2

The table was compiled by the authors based on official statistical data: Osaulenko, O. H. (Ed.). (2010). Statystychnyi shchorichnyk Ukrainy za 2009 rik [Statistical Yearbook of Ukraine for 2009]. Kyiv: Konsultant, 566 p.

When analysing these data, it should be taken into account that state budget expenditures were mainly directed to financing vocational (vocational and technical) and higher education institutions, as well as subsidies for local budgets to pay salaries to teaching staff of preschool and general secondary education institutions. Local budgets' funds in financing education in Ukraine in the indicated years amounted to 59 to 65%, which is a significant indicator. However, these resources were only enough to support the functioning of the educational sector, not to develop the quality of education.

Under the influence of European educational reforms, a clear understanding of the need to increase the role of the public, as well as local self-government, in the field of education has been formed in Ukraine. Even in the National Doctrine of Education Development, approved in 2002, there was emphasized the need to redistribute functions and powers between central and local executive authorities on the one hand and local self-government bodies on the other (Natsionalna doktryna, 2002). The National Strategy for the Development of Education in Ukraine for 2012 – 2021, approved in 2013, declared the transition from state to state-public administration, a clear separation of functions between central, regional and local government bodies, ensuring self-government of educational institutions and scientific institutions, establishing a harmonious combination of the rights of the individual, society and the state in the field of education (Natsionalna stratehiia, 2013). However, real changes in the sphere of decentralization of public administration, budget financing, and therefore education, occurred after the Revolution of Dignity of 2013 – 2014.

In Ukraine, the decentralization process began in 2014 with the adoption of the Concept of Reform of Local Self-Government and Territorial Organization of Power in Ukraine (01.04.2014), Laws of Ukraine “On Cooperation of Territorial Communities” (17.06.2014), “On the voluntary unification of territorial communities” (05.02.2015) and amendments to the Budget and Tax Codes – regarding financial decentralization. This process made it possible to form, in accordance with the provisions of the European Charter of Local Self-Government, a significant, effective and capable institution of local self-government at the basic level – united territorial communities (OTH). By 2020, 1,070 OTHs were established in Ukraine, in which 4,882 communities voluntarily united (Reforma detsentralizatsii, 2020).

Amendments to the Tax and Budget Codes, which came into effect on January 1, 2015, provided local governments with greater financial resources to increase their economic capacity. United communities acquired the powers and resources that cities of regional significance have, in particular, the transfer of 60% of personal income tax to local budgets of OTHs under their own powers. In addition, revenues from taxes remain entirely at the local level: single tax, income tax on enterprises and financial institutions, municipal property tax, and property tax (real estate, land, transport). In addition, OTHs have direct inter-budgetary relations with the state budget (before the reform, only regional and district budgets, as well as budgets of cities of regional significance, had direct relations), to fulfill the powers delegated by the state, they are provided with appropriate transfers (grants, educational and medical subventions, subventions for the development of community infrastructure, etc.). Legislative changes also gave local governments the right to approve local budgets regardless of the date of adoption of the Law on the State Budget. Own revenues of local budgets from 2014 to 2019 increased by 200 billion UAH – from 68.6 billion UAH to 267 billion UAH (Reforma detsentralizatsii, 2020).

The new law “On Education” of September 5, 2017 defined the powers of local government bodies at three levels of the administrative and territorial structure of the state: 1) the Supreme Council of the Autonomous Republic of Crimea (ARC), regional councils, Kyiv and Sevastopol city councils; 2) district, city councils and councils of united territorial communities; 3) village and settlement councils. All of them are recognized as responsible for implementing state policy in the field of education and ensuring the quality of education in the relevant territory. The Supreme Council of the Autonomous Republic of Crimea, regional councils, Kyiv and Sevastopol city councils have the following powers: ensure the availability of complete general secondary education (high school) and professional (vocational

and technical) education; plan and ensure the development of a network of specialized secondary, professional (vocational and technical) and extracurricular education institutions, specialized educational institutions (scientific, military, sports, artistic), postgraduate education institutions, special educational institutions for people with special educational needs, scientific methodological educational and methodological institutions; have the right to establish educational institutions, including for people with special educational needs, as well as to reorganize and liquidate them (Zakon Ukrainy, 2017).

District, city councils, and councils of united territorial communities ensure the availability of preschool, primary, and basic secondary education, as well as extracurricular education. At the same time, they plan and ensure the development of a network of preschool, primary and basic secondary education institutions, and out-of-school education; they plan and ensure the development of a network of specialized secondary education institutions of an academic orientation (city councils with a population of more than 50 thousand – independently; city councils of cities with a population of less than 50 thousand – in agreement with the regional council); have the right to establish educational institutions, reorganize and liquidate them; ensure the availability of preschool and secondary education for all citizens living in the relevant territory, and take measures to ensure the need for preschool and after-school education (Zakon Ukrainy, 2017). The least powers are held by village and settlement councils. They ensure the availability of preschool and primary education, have the right to establish educational institutions, reorganize and liquidate them, and ensure their activities and development (Zakon Ukrainy, 2017).

The reforms carried out have established a mixed model of a local self-government (state-public) in Ukraine. The same model has been extrapolated to the management and financing of the education sector. The state budget in Ukraine provides for: payment of labour with accruals for teaching staff of institutions providing general secondary education (educational subvention); remuneration with accruals for teaching staff of inclusive resource centres (educational subvention); purchase of textbooks; support for individuals with special educational needs in preschool, general secondary and vocational (vocational and technical) education institutions; ensuring the formation of a new educational space; other expenses (budgetary programmes). Local budgets cover the following issues: maintenance of institutions and payment of labour of teaching staff of out-of-school and preschool education institutions, the centre for professional development of teaching staff, and the inter-school resource centre; payment of non-teaching staff of all established institutions; implementation of the development strategy of the general secondary education institution, including the implementation of innovative activities of the educational institution (Yaka rol orhaniv mistsevoho samovriaduvannia, 2023). Therefore, local governments have retained the right to receive educational subsidies. The procedure for distributing educational subsidies between local budgets is determined according to a formula based on the number of students studying in the relevant territory, taking into account the following factors (Zakon Ukrainy, 2017).

At the same time, newly created OTGs were required to establish education management bodies. The law gave local councils the opportunity to choose several options: to establish their own education management body; to establish their own body with delegation of administrative powers to the level of educational institutions; to establish a joint body for several territorial communities; to delegate powers on the basis of cooperation (Terentieva, 2021). Local governments are entrusted with the functions of controlling the activities of educational institutions they establish. Since control of the activities of educational institutions

by the founder is not a form of state supervision (control), there are no consequences for educational institutions, except for taking into account the results of the inspection when forming educational development plans or justified disciplinary measures for the head. Control should not violate the academic, organizational, personnel, and other autonomy of educational institutions. The objects of control are the financial and economic activities of educational institutions, their compliance with constituent documents, implementation of the plan of measures aimed at preventing and combating bowling, and preventing privileges or restrictions (discrimination) (Povnovazhennia, 2021, p. 9).

In accordance with the Law of Ukraine “On Complete General Secondary Education”, local governments must form plans for the development of a network of educational institutions (Zakon Ukrainy, 2020). The plan can be part of the community education development strategy, its appendix, or a separate document (Povnovazhennia, 2021, p. 15). The plan should contain not only the community’s vision for primary schools, gymnasiums, and lyceums of various profiles, but also provide for the creation of inclusive resource centres (IRCs), professional development centres (PDCs), and, if necessary, inter-school resource centres (IRCs). The creation of IRCs is envisaged for territorial communities with up to 7 thousand children in rural areas or at least 12 thousand children (under 18 years of age) in cities or urban areas. To create a CPR, it is necessary to determine the number of professional staff needed by the community. Several communities have the right to create a joint CPR (Povnovazhennia, 2021, p. 21). By the end of 2023, 690 IRCs were established in Ukraine, however, 46 of them ceased operations because they ended up in occupied territory (36 were completely or partially destroyed). Despite the fact that during the Russo-Ukrainian war, a significant number of specialists changed their place of residence within Ukraine or went abroad, the IRCs are provided with teaching staff (speech therapist teachers, special education teachers, rehabilitation teachers, practical psychologists) by 81.7% (4045 people) of the total need (Statystychni dani, 2023).

A significant achievement of decentralization and educational reforms in Ukraine was the increased attention of local governments to the problem of ensuring inclusive education, namely the creation of inclusive groups and classes in educational institutions. According to current statistics, as of December 1, 2023, 6,158 inclusive groups have been created in preschool education institutions, in which 11,285 pupils with special educational needs receive education and socialize. There were 29,321 inclusive classes in general secondary education institutions, where 40,354 students with special educational needs were educated. The number of special classes in general secondary education institutions reached 807, with 7,044 students with special educational needs in them. Over the past five years, the number of students with special educational needs in inclusive classes in general secondary education institutions has more than doubled (Statystychni dani, 2023). Of course, this became possible owing to special programmes financed from the state budget of Ukraine. However, a significant role was played by local governments, which, in their strategies for the development of education in OTHs, set the task of increasing the quality of education.

For example, the development strategy of Haisyn urban territorial community (Vinnytsia region), approved in June of 2021, recognizes one of the community’s weakest points: underpopulated and under-equipped rural schools, underdeveloped extracurricular education. Among the objectives planned for implementation by 2030, the strategy of this community determines: 1) carrying out major repairs, reconstruction, and thermal modernization of preschool and school facilities, taking into account the needs of people with physical

disabilities; 2) equipping preschool and school educational institutions with modern equipment necessary for the educational process; 3) purchasing school buses to organize transportation of students and teaching staff to educational institutions; 4) creation of supporting educational institutions; 5) creation of basic educational institutions; 6) introduction of scholarships for the 50 best students (Stratehiia Haisynskoi hromady, 2021).

An illustrative example is Nemyriv urban territorial community (Vinnytsia region), which, in accordance with the community development strategy approved in 2018, planned to spend UAH 57.5 million on education, which was 41% of its budget. (Stratehiia Nymyriivskoi hromady, 2018). Even higher indicators were demonstrated by Pustomytsi community (Lviv region), whose budget amounted to UAH 186 million, of which 58% was planned for the education sector, primarily for improving the quality of education. By 2027, it is planned to “increase educational potential”, which involves implementing, in particular, the following measures: 1) to conduct a study of educational needs and the level of population satisfaction with educational services; 2) to create a database of teaching staff; 3) to establish a Centre for Professional Development of Teachers; 4) to develop a system of bonuses for teaching staff in accordance with the achieved work results; 5) to improve the material and technical base of preschool education institutions; 6) to ensure digitalization of processes in educational institutions, the availability of high-speed Internet in all educational premises; 7) to complete the construction of a school in the village of Semenivka, build another preschool education institution in the town of Pustomytsi; 8) to implement specialized training in high school, to establish a lyceum; 9) to ensure unhindered access for people with disabilities to educational institutions; 10) to introduce “full-day schools” (Stratehiia Pustomytsivskoi hromady, 2021). Of course, it is still too early to talk about the results of the implementation of development strategies for territorial communities in Ukraine, but planning documents demonstrate the orientation of local governments towards the development of quality education.

It should be noted that state authorities demonstrate their influence on local educational policy, in particular regarding the optimization of the network of educational institutions. The government does not provide educational subventions to finance the salaries of teachers in educational institutions with fewer than 45 students. According to the Ministry for Education and Science, in the 2023/24 academic year, 1,012 gymnasiums and 193 lyceums with up to 60 students operated in Ukraine, as well as 468 gymnasiums and 71 lyceums with up to 45 students. At the same time, there are 31 gymnasiums and 12 lyceums in Ukraine with up to 25 children studying. Potentially, from September 1, 2025, 437 gymnasiums and 59 lyceums will not receive educational subventions, and from September 1, 2026, another 544 gymnasiums and 122 lyceums will not receive them (Barsukova, 2024). Of course, such steps will force local governments to adjust the network of educational institutions.

The Conclusions. Therefore, the history of local government educational policy in independent Ukraine can be divided into three periods. The first one (1991 – 1997) was a period of uncertainty regarding the competencies and powers of local government bodies in the field of education due to the variability of legislation, fluctuations between community and state models of local self-government, as well as a severe economic crisis in the country. The second one (1997 – 2014) was the period of establishment of the state-public model of local self-government, the distribution of functions for the management, financing and control of education between state authorities and local governments, and the growth of the role of local governments in financing education, which covered 60% of expenditures on educational institutions. At the same time, education funding remained low due to low local

budget revenues. The third one (from 2014) is the period of decentralization (administrative), educational, and budgetary reforms, as a result of which the issue of education has become one of the central issues in the activities of local government bodies. This period is characterized by increased investment in education, modernization of the education network, improving the quality and accessibility of education, and ensuring its inclusiveness. Local governments form strategic objectives for the development of education as one of the main ones for the further development of territorial communities, and therefore plan significant expenditures on education – 40–60% of their budgets.

Acknowledgements. We express sincere gratitude to all members of the editorial board for consultations provided during the preparation of the article for publishing.

Funding. Funded by the European Union. Views and opinions expressed are however those of the authors only and do not necessarily reflect those of the European Union or European Education and Culture Executive Agency (EACEA). Neither the European Union nor EACEA can be held responsible for them.

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*The article was received April 08, 2024.
Article recommended for publishing 29/11/2024.*

UDC 930.2:001.89]:004
DOI 10.24919/2519-058X.33.317459

Oleksandr BONDARENKO

PhD hab. (History), Professor of the Department of History, Archaeology, Information and Archival Affairs, Central Ukrainian National Technical University, 8 Prospekt Universytetsky, Kropyvnytskyi, Ukraine, postal code 25006 (o.v.bondarenko.un@gmail.com)

ORCID: 0000-0001-8582-513X
Researcher ID: ABD-2888-2020
Scopus-Author ID: 58790758600

Svitlana ORLYK

PhD hab. (History), Professor in the Department of History, Archaeology, Information and Archival Affairs, Central Ukrainian National Technical University, 8 Prospekt Universytetsky, Kropyvnytskyi, Ukraine, postal code 25006 (svitlana.orlik@gmail.com)

ORCID: 0000-0002-6280-9273
Researcher ID: C-1033-2019
Scopus-Author ID: 57222035842

Mark PYZYK

PhD (Classics), Getty Research Institute (GRI), Los Angeles, California, United States, postal code 90049 (mpyzuk@getty.edu)

ORCID: 0000-0001-7542-4252
Scopus-Author ID: 58802763400

Олександр БОНДАРЕНКО

доктор історичних наук, професор кафедри історії, археології, інформаційної та архівної справи Центральноукраїнського національного технічного університету, пр. Університетський, 8, м. Кропивницький, Україна, індекс 25006 (o.v.bondarenko.un@gmail.com)

Світлана ОРЛИК

докторка історичних наук, професорка, професорка кафедри історії, археології, інформаційної та архівної справи Центральноукраїнського національного технічного університету, пр. Університетський, 8, м. Кропивницький, Україна, індекс 25006 (svitlana.orlik@gmail.com)

Марк ПИЖИК

доктор філософії, Дослідницький інститут Гетті, м. Лос-Анджелес, Каліфорнія, Сполучені Штати Америки, індекс 90040 (mpyzuk@getty.edu)

Bibliographic Description of the Article: Bondarenko, O., Orlyk, S., & Pyzyk, M. (2024). Digital Technology in Historical Research: Contemporary Scholarly Current. *Skhidnoievropeyskyi istorychnyi visnyk [East European Historical Bulletin]*, 33, 227–238. doi: 10.24919/2519-058X.33.317459

**DIGITAL TECHNOLOGY IN HISTORICAL RESEARCH:
CONTEMPORARY SCHOLARLY CURRENTS**

Abstract. The purpose of the article. This article summarises developments in contemporary Ukrainian history regarding the use of digital technology in historical research, examining both

successes and challenges. In writing it, we fill a need within Ukrainian historiography by highlighting the challenges of using digital technologies in historical research, broadly, along with particular obstacles to doing history in the digital era. **The methodology** of the study is based on a combination of the principles of historicism, objectivity, systematicity, and the use of general scientific methods – analysis, synthesis, abstraction and generalisation; historical methods – chronological, typological and comparative historical; historiographical methods – specific historiographical analysis and synthesis. **The scientific novelty** of the article is that it is the first attempt at historiographical reflection on scientific publications that highlight the problem of using digital technologies in historical research, the peculiarities of their implementation in the context of the global information society as a new post-industrial form of social organisation. **We conclude** that a digital turn in history has indeed occurred, as others have argued, and that information technologies have significantly expanded the possibilities for research, storage, and publication. While the field of history remains independent-with its own disciplinary rules, methods, and norms-digital methods have nevertheless irreversibly entered its space. In the last ten years, there has been a certain amount of research around this topic in Ukrainian-language scholarship, which we cover in this paper. Nevertheless, we find that the historiographical and methodological problems posed by digital history have been covered by scholars in an ad hoc and uneven manner. More work is needed, because while the opportunities presented by digital technology are significant, a common understanding of its elements, and even a common definition of digital history itself, will be required for historians to benefit fully from this promise.

Keywords: digital history, digital humanities, digital turn, digital methodology, historical research, internet, contemporary historical discourse, digital numismatics.

ЦИФРОВІ ТЕХНОЛОГІЇ В ІСТОРИЧНИХ ДОСЛІДЖЕННЯХ: СУЧАСНИЙ НАУКОВИЙ ДИСКУРС

Анотація. Мета статті. Ця стаття підсумовує розвиток сучасної української історичної науки щодо використання цифрових технологій в історичних дослідженнях, розглядаючи як успіхи, так і виклики. Її написанням ми заповнюємо прогалину в українській історіографії, висвітлюючи виклики використання цифрових технологій в історичних дослідженнях у широкому сенсі, а також конкретні перешкоди на шляху історичних студій у цифрову епоху. **Методологія дослідження** ґрунтується на поєднанні принципів історизму, об'єктивності, системності та використанні загальнонаукових методів – аналізу, синтезу, абстрагування та узагальнення; історичних методів – хронологічного, типологічного та порівняльно-історичного; історіографічних методів – конкретно-історіографічного аналізу та синтезу. **Наукова новизна** статті полягає у тому, що вона є першою спробою історіографічної рефлексії наукових публікацій, які висвітлюють проблему використання цифрових технологій в історичних дослідженнях, особливості їх впровадження в умовах глобального інформаційного суспільства як нової постіндустріальної форми соціальної організації. **Висновки.** Цифровий поворот в історії справді відбувся, а інформаційні технології значно розширили можливості для дослідження, зберігання та публікації. Хоча історична наука залишається незалежною – із власними дисциплінарними правилами, методами і нормами – цифрові методи, тим не мені, незворотно увійшли в її простір. За останні десять років в україномовній науці з'явилася певна кількість досліджень на тему, яку ми висвітлюємо в цій статті. Тим не мені, вважаємо, що історіографічні та методологічні проблеми, які ставить цифрова історія, висвітлювалися науковцями ситуативно і нерівномірно. Необхідна подальша робота, оскільки, незважаючи на значні можливості, які надають цифрові технології для того, щоб історики могли повною мірою скористатися ними, потрібне спільне розуміння їхніх елементів і навіть спільне визначення самої цифрової історії.

Ключові слова: цифрова історія, цифрова гуманітаристика, цифровий поворот, цифрова методологія, історичні дослідження, інтернет, сучасний історичний дискурс, цифрова нумізматики.

Problem Statement. Over the last twenty or so years, the humanities have experienced what has been called a “digital turn” – namely, the emergence of the digital humanities,

a promising field combining the methods and subject-matter of the humanities with computational approaches, databases, and visual styles of presentation. History has not stood on the sidelines in this process – indeed it is one of the foundational contexts within which the digital humanities developed. One can speak of “digital history” arriving on the scene in the early 21st century as a subset of digital humanities – although even today there is still no canonical definition of either. Broadly, we define digital history as a methodological current within history that focuses on the use of information technology, digital media, quantitative methods, and data analysis in service of organizing, visualizing, and presenting historical materials.

This article focuses on scholarship in Ukrainian history and Ukrainian scholars – primarily those working in Ukrainian research universities (though we touch on work by some Ukrainian scholars working abroad). We do not describe the history of the digital humanities as an international movement or its development in other national contexts – nevertheless, this is a necessary part of the story and it is our hope that this work will also be read with that in mind. The goal of this article is to more accurately evaluate the engagement of Ukrainian historical scholarship with digital approaches (be it digital humanities or historical informatics), to acknowledge its main achievements, but also chart areas where further work is required.

Review of the Recent Research. The question of digital technology as a historical research tool has received a certain amount of attention among Ukrainian scholars. Two issues of the *Annual of the Historical Institute of Ukraine* – “Specialized Historical Disciplines: Theory and Method” – have taken up this topic, specifically the 2013 and 2015 volumes – “Electronic Information Resources.” The first of these surveys resources, especially in the digital humanities and social sciences, broadly construed. Articles focus on theory and methodology, but also on case studies in “historical informatics,” questions of academic honesty and intellectual property online, challenges in creating and maintaining digital reference tools, online historical publications, and resources in specialist fields (e.g., numismatics, paleography, historical geography, mapping, and sigillography). Hennadiy Boryak (Boryak, 2013), for instance, provides a broad overview of the development and direction of online resources in the social sciences and humanities. Volodymyr Kulikov (Kulikov, 2013) meanwhile surveys the rise and current state of digital history, along with its prospects going forward. Hryhoriy Papakin (Papakin, 2013) covers the concerns and scholarly state-of-the-art in digital paleography. Kateryna Lobuzina (Lobuzina, 2013) discusses challenges associated with digital resources in the cultural heritage space, and Olha Ivanova (2013) discusses the intersection of digital manuscripts and database resources.

The 2015 volume – “Specialized Historical Disciplines: Theory and Method, Electronic Resources” – focuses on digital resources of a more narrowly historical nature. A major topic is the use of contemporary social networks as historical sources. Hanna Kalynychenko (Kalynychenko, 2015) and Larysa Yurkova (Yurkova, 2015) both focus on Facebook as a rich source for the Revolution of Dignity. The collection also covers issues in historical informatics, digital paleography, electronic resources for bibliographic, archival, and manuscript projects, as well as digital resources for cultural heritage. Heorhiy Papakin (Papakin, 2015) focuses on online publishing in the United States and western Europe. Hennadiy Boryak and Natalia Kashevarova (Boryak & Kashevarova, 2015) examine online resources for the history of eastern Europe. Lesia Khaletska (Khaletska, 2015) focuses on preservation and UNECSO world heritage resources, and Iryna Khromova (Khromova, 2015) discusses digital approaches to numismatics.

It should be said that – outside of the literature review above, and outside of scattered publications that discuss narrow aspects of it – digital history has not been systematically treated by Ukrainian historians. Heorhiy Papakin has previously discussed the “digital turn” in the social sciences and humanities with respect to source studies¹. Yuriy Svyatets (Svyatets, 2024) elaborates on the differences between the “digital humanities” and “historical informatics” – the latter being basically unknown in western European and American scholarship. In another paper (Svyatets, 2019), he discusses theoretical and methodological considerations in relation to digital sources and the practice of historians. Kalakura and Palienko (2021) consider the place of electronic archival studies in an increasingly digital Ukrainian society. A new study dedicated to the reflection of Ukrainian history of the 17th – early 18th centuries on leading Ukrainian historical YouTube channels was prepared by Liudmyla Vovchuk and Wiktor Werner (Vovchuk & Werner, 2024).

Numismatics is perhaps the biggest exception to this generalization. The question of information technology and its use in numismatic research was the topic of a separate section of the seventh issue of the *Ukrainian Numismatic Annual* in 2023: several articles appear therein, including Viktor Kotsur, Svitlana Orlyk, and Oleksandr Bondarenko (Kotsur, Orlyk & Bondarenko, 2023), Mark Pyzyk (Pyzyk, 2023), and Olena Shvets (Shvets, 2023). The topics overwhelmingly deal with the digitization of numismatic objects and digital approaches to numismatic research. Numismatics – a sub-branch of historical studies – is perhaps the most internationally active area of Ukrainian digital historical research. Starting in 2021, a group of researchers under V. Orlyk participated in a series of collaborative numismatic projects in cooperation with scholars at Princeton University through the Framing the Late Antique and Medieval Economy (FLAME) project (Pyzyk, 2021). V. Orlyk has published a number of articles, either himself or with co-authors along these lines (Orlyk, 2013; Kotsur, 2016; Orlyk, 2021a; Orlyk, 2021b; Orlyk & Mekh, 2022; Orlyk, 2023a; Orlyk, 2023b; Orlyk & Pyzyk, 2023; Shvets, 2023b).

Numismatic efforts have extended beyond the borders of Ukraine, often through the efforts of Ukrainian scholars abroad. Thus, several concurrent efforts are afoot to document coins discovered on the territory of Ukraine. The Coin Finds of Ukraine (CFU) project, an international effort staffed by Ukrainian, Canadian, and American scholars – supported by the Canadian Institute of Ukrainian Studies, Stanford University, and the American Numismatic Society (ANS) – collects and publishes information on ancient Greek coins, roughly from the 6th to the 1st century BCE (Pyzyk, 2023). The German Archaeological Institute (DAI) has launched a similar effort, also staffed by an international group of scholars that includes Ukrainians, to document Roman coin finds in Ukraine – the so-called AFE-UKR database. AFE-UKR dovetails neatly with CFU, chronologically, since it runs from the 1st century BCE to the 6th century CE and thus provides more than a thousand years of numismatic coin find history across both databases (Yanov, 2024). Both projects engage heavily with western European and American numismatics, and both tie into a recent trend in the digital humanities – Linked Open Data. Linked Open Data is not quite new – having been formalized as a technical standard in the late 1990s. It was first proposed as a solution for reconciling

¹ The specific field – “Джерелознавство,” literally “source-studies” – has no exact equivalent in Anglo-American scholarship. Textual criticism – originally dealing with the reconstruction of biblical and Greco-Roman texts – is perhaps a good analogue, but “source studies” in the eastern European mode has added to this additional theoretical structures/concerns, such that modern databases and digital platforms are explicitly included in this scaffolding. Topics like this are more or less separate in textual criticism (even the most explicitly digital textual projects, like the *Thesaurus Linguae Graecae*, treat their project as a straightforward extension of 19th century publishing efforts like the Oxford Classical Text series – which is to say, with little methodological self-consciousness).

data between – and often even within – subjects and disciplinary fields, by formalizing data structures, conceptual models, and terminology. In terms of the digital humanities, it has primarily been used – beginning in the early 2010s – in the museum and collections-management space through organizations like the DAI, ANS, Getty Research Institute, and Yale’s Beinecke Library (all dealing with material culture and collections).

In summary, with the exception numismatics, Ukrainian scholarship’s adoption of digital methods in historical research has been quite modest, and in general, there is no cohesive movement and no comprehensive research program towards this goal.

Purpose of the Research. This article summarises developments in contemporary Ukrainian history regarding the use of digital technology in historical research, examining both successes and challenges. In writing it, we fill a need within Ukrainian historiography by highlighting the challenges of using digital technologies in historical research, broadly, along with particular obstacles to doing history in the digital era.

Results of the Research.

Problems of Digital History. The emergence of digital history is a response, first, to advances in digital technology over several decades, and second to changes in the discipline of history itself. The anthropological and post-structuralist turn in history (lasting perhaps from the 1970s to the 2000s) – which gave rise to new theoretical and methodological emphases (resulting in a focus, for example, on social history, microhistory, and histories of thought) – has by now (but beginning in the early 2000s) either been folded into or given way to a digital turn (focusing on quantification, network analysis, and visually-oriented communication styles). New methods of collection, processing, storage, analysis, and publication have become standard in contemporary historical research.

It should be noted that there is no uniform consensus among Ukrainian scholars on the nature of digital history. Indeed, there are competing definitions that align along highly charged partisan lines. Consider, for instance, the Moscow school of Historical Informatics. Pavlo Yeremeev, Volodymyr Kulikov, and Yuriy Sviatets survey this field, defining it as a specialized historical sub-discipline that, according to P. Yeremeev, “today, in one way or another... remains a significant branch of historical studies in the successor states of the USSR” (Yeremeev, 2015, p. 186). However, the majority of contemporary historians in Ukraine seem to agree with the position, in line with American and western European scholars, that digital history should be grouped under the digital humanities (and by implication, separated out from historical informatics).

From this perspective, then, the most pressing problem is to define “digital history” – conceptually and typologically. Ukrainian scholars have put forward several definitions. Most broadly, it is considered a sub-species of the digital humanities, a discipline at the intersection of computer science and the humanities. Kulikov, for instance, understands the term “digital history” to mean “a direction in historical research aimed broadly at collecting, storing, presenting and visualizing historical and historiographical information with the assistance of information technology (e.g., virtual reconstructions, three-dimensional representations, online reference sources, and interactive technologies), in addition to the formation of virtual scholarly communities (‘collaboratories’), ‘cloud’ projects, etc.” (Kulikov, 2013, p. 29). It is notable that Kulikov’s article was one of the first Ukrainian articles to discuss digital history and the use of digital technology in historical research. In it, he surveys the development and landscape of digital history, international journals and digital history projects, outlining prospects and challenges moving forward.

Svyatets defines digital history as “a scholarly and applied historical field dealing with the creation and use of digital resources with respect to history. A digital resource is a synthetic informational product, created by means of digital technology. Thus, a historical digital resource... can be defined as a synthetic informational product, created by the historian – independently or in their capacity as a domain expert – through digital technology by synthesizing information from traditional historical sources” (Svyatets, 2024, p. 370).

Defining the subject is a crucial step in clarifying the best use of digital technology in historical research. Yu. Svyatets discusses the similarities and differences between historical informatics and digital history. First and foremost, both involve the use of computers and communication technologies to advance historical studies. According to him, historical informatics as a field can be traced to March of 1987 and the foundation of the International Association for History and Computing, the goal of which was to “promote the use of computers in all manner of historical study – both in the course of teaching and in research” (Svyatets, 2024, p. 366). According to him, however, today developments in the digital humanities have taken on a more dynamic aspect. Digital history as a constituent of “digital humanism” emerged in the 2010s, aiming to “expand and support digital research and education in the arts and humanities” (Svyatets, 2024, p. 366). He is firm that there is a difference between digital history and historical informatics. Despite their use of the same tools and pursuit of parallel subject matter – history – they have different aims, which condition different approaches to their subject. He emphasizes that the ambit of historical informatics is largely defined by “questions, theoretical and practical, of the use of information technologies for the conduct of historical research” to elicit further information in order to solve historical problems of fact (Svyatets, 2024, p. 374). The subject of historical informatics, according to Svyatets, is mainly the carriers of historical information and the media by which they “are delivered to historians, who further interpret them as particular narratives which embody bygone knowledge” (Svyatets, 2024, p. 374).

Svyatets describes the digital humanities, on the other hand, as a scholarly field that focuses on the creation of digital tools that synthesize “various historical sources, the historian’s domain expertise, with computers and communication technologies” (Svyatets, 2024, p. 374). Broadly speaking, the resulting digital resources may be designed to appeal to a wide circle of history buffs, not merely researchers. Specialists in the digital humanities (a growing field over recent decades) do, of course, pay attention to the question of how history is transmitted in digital form, and apply technology to the task of analyzing, producing, and ultimately distributing historical knowledge (Svyatets, 2024, p. 374).

Liudmyla Chekalenko, in defining digital history, considers disciplinary boundaries, noting that it already includes historical informatics within it – e.g., “e-history” – which uses computer technology to process historical sources. She emphasizes that these concepts – e-history and digital history – are more or less interchangeable in western countries (Chekalenko, 2021, p. 158). She nevertheless notes that there are differences between digital history and historical informatics. The former aims mostly “to develop digital infrastructure – the digitization of materials from libraries, museums, and archives, and also to create online interactive experiences in the form of historically-minded websites.” The second uses computer technology for the purpose of historical analysis – “that is, digital history – through digital technology – gathers and popularizes historical knowledge, while e-history focuses on its generation – purely an applied branch of historical studies” (Chekalenko, 2021, p. 158). It ought to be said that this assessment departs from the understanding of most western

European and American academics – e-history is not interchangeable with digital history. In fact, the field of e-history is relatively narrow, being promoted above all by the public historian, John Steinhauer, in a 2021 book about social media, technology, and new digital forms of history (Steinhauer, 2021). It is perhaps a growing, but nevertheless niche, corner of digital history and is otherwise unknown to most historians or digital humanists.

Olena Betlii has expressed her view on digital history, noting her agreement with Gerben Zaagsma, that the “digital” component is more or less ephemeral – history remains, and will remain, history. The appeal of the “digital” is mostly due to its novelty (Betlii, 2019). Indeed, the main problem that digital history raises, according to her, has to do with the essence of the historical discipline itself – precisely in so far as digital history seems to pose some sort of challenge to traditional history. The author claims that, faced with new digital approaches, the ordinary “habits of the historian” (focusing on historical method, office work, and the publication of research monographs) are no longer sufficient. So, on one hand, historians should begin to consider digital tools, algorithms, and so forth as academic contributions, being the basis upon which modern digital research is conducted. On the other hand, it should be acknowledged that digital projects are typically undertaken in teams and that its results are collaborative. In this context, Betlii’s assertion that “digital history concerns new knowledge and new research skills, new approaches to the work of research, new understanding of the possibilities for representing historical knowledge, and dynamic engagement with readers” (Betlii, 2019). On top of this, Betlii asserts that historians needn’t engage with all features of digital history – they can choose how computers should supplement the process of working with the past, either as data stores or as means of communication. Nevertheless, even here, the required conditions are absent in contemporary Ukraine (Betlii, 2019).

Liudmyla Chekalenko (2021) further considers the application of digital history through the prism of a relatively new historical sub-field – Public History – in a monograph on the topic, *Public History: Challenges in the 21st Century*. In this context, the proper subjects of digital history are the theoretical and practical problems of digitizing information about historical and cultural heritage and publishing it online – an opinion with which we concur. According to her, digital history is in fact a historiographical re-orientation, focusing not merely on theoretical but also practical consideration in digital publication – and for this reason she defines digital history as the particular sphere within which historical sources are processed for the sake of meaningfully representing them in contemporary media (Chekalenko, 2021, p. 157). The various ways to format historical data – including its sources, reference works, and scholarly literature – pose a serious problem. Primary among them, according to L. Chekalenko, is the basic question of authenticity of source documents, which has knock-on effects for their digitization. Another question she attempts to tackle (as most discussants of digital history do, to be fair) is how and to what extent digital sources can replace original documents in historical research. After this, the next question is how communities of historians and research specialists might, first, generate demand for digital research products and, second, participate in their development, maintenance, and improvement (Chekalenko 2021, p. 157). She argues, fairly, that the answer to this question will largely determine whether digital history will remain a series of vague promises or the basis for ongoing research. Thus, much depends on whether the needs of historians will come to conform – or be made to conform – to the shape of contemporary digital technologies, or whether historians will continue to take a wait-and-see approach, in which case digital humanities tools will continue to focus primarily on education and entertainment – not the needs of historical researchers:

“procrastination... can result in significant delays in historical research, especially for those relying on local source materials [archaeological, archival, etc.]” (Chekalenko, 2021, p. 158).

Notably, L. Chekalenko recommends some particular applications of digital history – for example: the reconstruction of museum objects using 3D modeling and the use of geo-spatial systems for presenting historical information on maps; the development of online references tools, encyclopedias, dictionaries, atlases, etc. (in some cases, soliciting contributions by users); the use of interactive formats for conveying historical information through the medium of videogames; the creation of “social media” that envisions an active role for its users in shaping the function of these collective resources (Chekalenko, 2021, p. 158). She asserts that the “technological horizons of digital history have gradually expanded, and in historically-oriented education, digital technologies have taken on an important role of their own. This is clearest in museum studies, which is no accident, since the term digital history wasn’t really coined by historians – neither by educators or researchers – but by specialists working in the technology departments of museums, archives, and other cultural heritage institutions” (Chekalenko, 2021, p. 158).

H. Papakin addresses digital history in a lengthy article – “The Digital Turn in Source Studies: Fact, Opinion, or Fiction?” – which examines the humanities and social sciences, but in particular source studies. He notes that “growth in digital technology has imposed significant changes on the academic work cycle in the social sciences and humanities” (Papakin, 2021, p. 153). In his view, the 1990s inaugurated a digital turn for humanity in general, considerably affecting history, philosophy, cultural studies, law, linguistics, and so on. This has led to the perverse outcome that, while all contemporary researchers use these technologies, they simultaneously criticize these new sources – “surrogates” for the real ones.

His goal is to assess the consequences of the digital turn for the humanities – in what ways is it helpful, in what ways harmful (Papakin, 2021, p. 157)? According to him, there are two primary factors at play in this digital revolution. The first is the very rapid growth in digital sources. The second is the almost complete lack of methodological agreement on how they ought to be processed. He concludes that, for these reasons, the consequences of the digital turn remain largely unknown to humanists (Papakin, 2021, p. 157). His basic conclusion – that we cannot ignore the emergence of new sources – seems entirely reasonable. Nevertheless, there is no guarantee that his advice – about the nature of the digital turn and the need to adjust to it – will be taken, since there remains a basic lack of understanding concerning the advantages and disadvantages of digital resources (Papakin, 2021, p. 168). H. Papakin urges fellow historians not to ignore the digital turn or to try to wait it out – defending the Ivory Tower against the digital hoards: this is an illusion that will harm the discipline. According to him, “it is a myopic professional conservatism, clinging to old, tested research practices.” In fact the goal should not be to subvert these, but to channel them such that “new digital methods and tools might actually expand and complement traditional ones” (Papakin 2021, 168).

Oksana Yurkova considers the question of the social network Facebook as a novel kind of historical source – its characteristics, various means of capturing information, description of its contents, and strategies for archiving it. According to her, the potential in analyzing such a historical source seems to be limitless. When paired with standard historical methods, one gleans not merely substance (along the lines of a traditional historical source), but also meta-substance: one can also identify network connections, track collective initiatives, measure the dissemination of information and ideas, as well as support or opposition for them. It enables historians to examine the influence of the state over society, or conversely society over state – depending on the goals of the researcher (Yurkova, 2015, p. 37). Nevertheless, despite the importance of Facebook as an “e-source,” and aside from efforts to collect, classify, and

process Facebook data, she considers the most important task to be the snapshotting, storage, and archiving of Facebook data – which is deceptively ephemeral, vulnerable to editing and outright destruction of information. This is a “significant challenge for archival studies and applied archeography – since, if we fail to save data here and now, there will be nothing to classify and analyze in the future” (Yurkova, 2015, p. 38). In the end, Yurkova offers some terminological proposals. Acknowledging that the internet is a broad “e-field” with diverse “e-sources,” new sub-fields should emerge: e-archaeology, e-archive-studies, and e-source-studies (Yurkova, 2015, p. 47).

H. Kalynchenko has considered these issues, namely the potential of Facebook as a historical source, in relation to the Euromaidan in Ukraine, emphasizing the particular value and advantage that it offers. Her goal is to taxonomize Pro-Maidan sources, while raising issues of collecting, storing, visualizing, and preserving them – emphasizing methods that can, in her words, “de-virtualize” these sources. She emphasizes that “we ought specifically to discuss Facebook as a modern historical source tracing the course of the Euromaidan. Historians are left with an unprecedented trove of research materials. And they ought to prioritize the organization, storage, and use of that information, whose value and significance will be determined by users. In [her] opinion, this enables not merely the preservation of memory around these events, but also envisions a history of the revolution, written by its participants, as Ukrainians saw it – with their own eyes, without censorship, without spin” (Kalynchenko, 2015, p. 27).

Two of the present authors, in an article co-written with V. Kotsur (Kotsur, Orlyk & Bondarenko, 2023), discuss the history of digital numismatics as a flavor of digital history. They begin by noting that the emergence of digital technologies have introduced “new sources of information – for instance, online forums – which require methodological adjustments but which can allow us to preserve information about numismatic coin finds (e.g., their type, provenance, etc.) [which was previously impossible]” (Kotsur, Orlyk & Bondarenko, 2023, p. 270). Analyzing the current state of digital numismatics, they distinguish between two related processes – digitization and digitalization – emphasizing that “they are not, either in numismatics or in other fields, simply fads. The two are instead fundamental processes creating new avenues in numismatic research, which require the development of new methodologies for collection and analysis, as well as the development of critical attitudes toward digital sources” (Kotsur, Orlyk & Bondarenko, 2021, p. 270). Shvets reaches the same conclusion in her analysis of digital methods in seal analysis. She notes that digitization in numismatic research “has already demonstrably improved quality and efficiency in research, cutting time and improving accuracy in obtaining results and reaching conclusion” (Shvets, 2023, p. 303).

Conclusions. In the course of this article, we have surveyed recent work in contemporary Ukrainian history around the use of digital technologies, and note that there has been growing scholarly interest in the problems and possibilities that it raises. In the end, this collective work may encourage the emergence of some scholarly consensus. Of particular note, we identify a need for conceptual and definitional structure – i.e., what is digital history? – in order to better create research tools, systematize principles behind their development and use, and settle on some methodological standards for the field.

We define the term “digital history” primarily in terms of preserving historical and cultural heritage through the use of digital technology. This is facilitated through historians’ increasing familiarity with digital historical resources, which have become more and more prominent over time. In this way, digital history functions as a tool for research, education, and publication. And indeed, scholars’ idea of digital history is still evolving. In the early 2000s it had to do with the role of computer technology in the historian’s work, but today it

has considerably expanded through ongoing digitization of sources, publications, electronic libraries, journals, and databases – all of which are available to practicing historians.

Scholars have derived several significant benefits from digital history. First, they use the digitized collections and online libraries – full of traditional works – that are available online. Second, they add to these – creating, sifting, analyzing, and preserving the past in new ways online. Third, they access sources that, in the past, would have been remote, inaccessible, or simply unavailable, doing “archival research from their home office.” The single biggest demand for digital history is in museums, which are experimenting with novel means to reach audiences, including virtual tours and exhibitions.

Nevertheless, even within Ukrainian historiography, we have managed only to touch briefly upon the conceptual challenges involved in using digital technology for history, and we have considered the development of conceptual and methodological rigor only in outline. The problems are complex, but the solutions – which involve tackling theoretical questions around the role of the computer and communication technologies in history, the development of research tools, systematic principles for new methodologies, and even the comprehensive definition of digital history – are of critical importance.

Acknowledgements. The authors wish to extend sincerest gratitude to all members of the editorial board for their advice during the writing of this article for publication.

Funding. The authors have received no financial support in the course of researching, writing or publishing this article.

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*The article was received May 02, 2024.
Article recommended for publishing 29/11/2024.*

UDC 355.4(470:477):811.161.2'272"2014/2022"
DOI 10.24919/2519-058X.33.317463

Paraskoviya DVORIANYN

PhD (Social Communications), Associate Professor, Department of broadcast and television, Ivan Franko National University of Lviv, 1 Universytetska Street, Lviv, Ukraine, postal code 79000 (paraskadvoryanyn@gmail.com)

ORCID: 0000-0002-7858-3563

Yurii TELIACHYI

PhD hab. (History), Professor, President of Khmelnytskyi Cooperative Trade and Economic Institute, 3 Kamianetska Street, Khmelnytskyi, Ukraine, postal code 29000 (yute70@ukr.net)

ORCID: 0000-0003-0565-2211

Researcher ID: EAQ-4467-2022

Scopus ID: 58682590900

Парасковія ДВОРЯНИН

кандидатка наук з соціальних комунікацій, доцентка кафедри радіомовлення і телебачення, Львівський національний університет імені Івана Франка, вул. Університетська, 1, м. Львів, Україна, індекс 79000 (paraskadvoryanyn@gmail.com)

Юрїї ТЕЛЯЧИЙ

доктор історичних наук, професор, президент Хмельницького кооперативного торговельно-економічного інституту, вул. Кам'янецька, 3, м. Хмельницький, Україна, індекс 29000 (yute70@ukr.net)

Bibliographic Description of the Article: Dvorianyn, P., & Teliachyi, Yu. (2024). War and Language: Language Policy Issues of Ukraine in Domestic Mass Media Discourse (2014 – 2022). *Skhidnoievropeiskiy Istorychny Visnyk [East European Historical Bulletin]*, 33, 239–252. doi: 10.24919/2519-058X.33.317463

**WAR AND LANGUAGE: LANGUAGE POLICY ISSUES OF UKRAINE
IN DOMESTIC MASS MEDIA DISCOURSE (2014 – 2022)**

Abstract. *The purpose of the research* is to clarify the content of the media discourse on the full policy in Ukraine, to identify the main topics covered by the Ukrainian media, and to indicate the analytical and evaluative component of materials on reforms in the field of language policy. *The chronological framework of the study (2014 – 2022) is determined by:* a) the completion of the Revolution of Dignity and the coming to power of the pro-European governments in Ukraine, b) the beginning of Russia's full-scale war against Ukraine, which forced the Ukrainian government to reconsider traditional approaches to language policy. **The research methodology** is based on the principles of scientificity, systematicity, as well as the use of discourse analysis as an interdisciplinary approach to the study on mass media space. **The scientific novelty:** the content of media discourse on language policy in Ukraine during the current Russo-Ukrainian war has been studied for the first time. **The Conclusions.** Thus, the Ukrainian mass media focused on the language policy issues in Ukraine. The reasons for this were, on the one hand, the importance of resolving efficiently the issue on the ratio of the state

language, the Russian language and the languages of the national minorities in Ukraine for the stability of society, on the other hand, aggravation of this issue under the conditions of the modern Russo-Ukrainian War; the ideological discourse of which included the myth of “oppression of the Russian language”. The Ukrainian mass media during the period under analysis (2014 – 2012) focused on three key manifestations of the language policy: 1) conflicts regarding the abolition of the conflict-generating language law of 2012 (the Kivalov-Kolesnichenko law), as well as the development and public adoption of a new law on languages in Ukraine; 2) discussions on the legislative introduction of the language quotas for television, radio, and book publishing; 3) internal and external disputes about the language article of the law “On Education”. It should be recognized that the majority of the Ukrainian media supported the language policy of the Ukrainian governments regarding the establishment of Ukrainian as the state language in Ukraine, although they tried to adhere to objective coverage of events and interpretation of the positions of political forces.

Key words: language policy, current Russo-Ukrainian war, language legislation, educational reform, mass media discourse.

ВІЙНА І МОВА: ПРОБЛЕМАТИКА МОВНОЇ ПОЛІТИКИ УКРАЇНИ У ВІТЧИЗНЯНОМУ МАС-МЕДІЙНОМУ ДИСКУРСІ (2014 – 2022)

Анотація. Мета статті – з’ясувати зміст медійного дискурсу щодо мовної політики в Україні, виокремити основні теми, які висвітлювалися українськими ЗМІ, а також вказати на аналітичну й оцінювальну складову матеріалів, присвячених реформам у сфері мовної політики. Хронологічні рамки дослідження (2014 – 2022) зумовлені: а) завершенням Революції Гідності та приходом до влади в Україні проєвропейських урядів, б) початком повномасштабної війни Росії проти України, яка змусила український уряд переглянути традиційні підходи до мовної політики. **Методологія дослідження** ґрунтується на принципах науковості, системності, а також використанні дискурс-аналізу як міждисциплінарного підходу до студіювання мас-медійного простору. **Наукова новизна:** вперше досліджено зміст медійного дискурсу щодо мовної політики в Україні у роки сучасної російсько-української війни. **Висновки.** Отже, українські мас-медіа надавали особливу увагу питанням мовної політики в Україні. Причини цього полягали, з одного боку, у важливості ефективного розв’язання проблеми співвідношення державної мови, російської мови та мов національних меншин в Україні задля стабільності суспільства, з іншого – загостренням цього питання в умовах сучасної російсько-української війни, ідеологічний дискурс якої містив міф про “утиски російської мови”. Українські ЗМІ у досліджуваній період (2014 – 2012) фокусували на трьох ключових проявах мовної політики: 1) колізії щодо скасування конфліктогенного мовного закону 2012 р. (закон Ківалова-Колесніченка), а також щодо розробки і суспільної ухвалення нового закону про мови в Україні; 2) дискусії про законодавче запровадження мовних квот для телебачення, радіо, книговидавництва; 3) внутрішні і зовнішні суперечки про мовну статтю закону “Про освіту”. Необхідно визнати, що більшість українських ЗМІ підтримували мовну політику українських урядів щодо утвердження української мови як державної в Україні, хоч і намагалися отримувати об’єктивного висвітлення подій і трактування позицій політичних сил.

Ключові слова: мовна політика, теперішня російсько-українська війна, мовне законодавство, освітня реформа, масмедійний дискурс.

The Problem Statement. The issue on ensuring the language rights of citizens has been one of the key segments in the mass media discourse in Ukraine for the long time. First of all, it is due to another trauma of the Ukrainian society associated with the linguocide caused by the Russian imperial regime and later the Soviet totalitarian regime. Full-scale Russification of the Ukrainians and the national minorities led to the dominance of the Russian language in the public life of Ukraine at the end of the 20th century. The situation worsened due to the inconsistent language policy of many governments of the independent Ukrainian state, as well as the active policy of the Russian Federation towards the spread of the Russian

language and culture in Ukraine. The Ukrainian media, covered various steps taken by the authorities in the field of language policy during the Russo-Ukrainian War, and also gave a voice to the representatives of the expert community, cultural and artistic figures, scholars and politicians, who analysed the language aspects of society and made recommendations regarding the language policy improvement.

The Analysis of Recent Researches. Jonathan Pool, the American political scholar, analysed the issue of “a fair language policy” (Pool, 1991). Juliane Besters-Dilger, the Austrian Slavic scholar, studied the level of presence of the Ukrainian language in education and media at the end of 20th and at the beginning of the 21st centuries (Besters-Dilger, 2007). Volodymyr Kulyk, the Ukrainian researcher studied the language policy of Ukraine as the interaction (or inaction) of the authorities, producers and consumers in 2013. In his opinion, the main and lasting contribution of all three bodies mentioned above is the preservation of status quo, which is characterized by the coexistence of the Ukrainian and Russian languages with the dominance of the Russian language (Kulyk, 2013). The scholar described the “language moods” in independent Ukraine and their relationship with the inconsistent language policy of the state authorities (Kulyk, 2017). Bohdan Azhniuk, the Ukrainian linguist carried out the analysis of the Ukrainian language legislation, in particular on the eve and during the current Russo-Ukrainian War (Azhniuk, 2017). The status of the state language in Ukraine and the emergence of “language conflicts” were revealed by Dominique Arel, Professor at the University of Ottawa (Canada) (Arel, 2017). Nadiya Kiss described the practice of a language activism in modern Ukraine, who under the slogan “language matters,” spoke out against irrational language policies in Ukraine (Kiss, 2020). Laada Bilaniuk, Professor at the University of Washington (USA), studied how language ideologies in Ukraine were linked to broader political and social problems (Bilaniuk, 2017). There were borrowed some methodological aspects of the research from the works written by Vitaliy Telvak and Vasyl Ilnytskyi (Telvak & Ilnytskyi, 2023), Mykola Haliv, Vasyl Ilnytskyi and Volodymyr Starka (Haliv & Ilnytskyi, 2021; Ilnytskyi, Starka & Haliv, 2022; Haliv & Ilnytskyi, 2023). It should be stated that the issue of the “language policy – media – war” triangle in the Ukrainian dimension requires additional research.

The purpose of the research is to clarify the content of the media discourse on the full policy in Ukraine, to identify the main topics covered by the Ukrainian media, and to indicate the analytical and evaluative component of materials on reforms in the field of language policy. The chronological framework of the study (2014 – 2022) is determined by: a) the completion of the Revolution of Dignity and the coming to power of the pro-European governments in Ukraine, b) the beginning of Russia’s full-scale war against Ukraine, which forced the Ukrainian government to reconsider traditional approaches to language policy.

The Results of the Research. The Russo-Ukrainian War broke out in 2014, under conditions of which the Ukrainian authorities tried to change the language policy of previous governments, guided by the requirements of the national security and strengthening the Ukrainian statehood. At that time, the law “On the Principles of State Language Policy” was in force in Ukraine, known as the “Kivalov-Kolesnichenko Law”. A significant part of the Ukrainian society was dissatisfied with the law and it became one of the reasons for the Revolution of Dignity. On February 23, 2014, the Verkhovna Rada of Ukraine repealed this law, but Parliament’s decision was not put into effect due to the absence of the President, who fled to Russia (Poroshenko nazvav, 2014). President Petro Poroshenko, who was elected in May of 2014, was not also eager to sign Parliament’s decision to repeal the Kivalov-

Kolesnichenko law, considering it erroneous (Poroshenko nazvav, 2014). The pro-Russian media speculated that the cause of Russia's military aggression against Ukraine was the repeal of this law.

At the same time, the media discussed the need to adopt a new law on languages in Ukraine. There was an article "Strynozheni Mova" (November of 2016) in one of the publications on the website "TSN. News", in which the anonymous author stated categorically: Ukrainian is the only unprotected state language in the entire world. He provided the example of the current Polish law, which was aimed at protecting and developing the Polish language and its dialects while emphasizing the need to adopt a new law on language. The presence of institutions was noted, aimed at monitoring the implementation of the language law, as well as sanctions against violators (Strynozheni mova, 2016).

In 2016, the deputies of the Verkhovna Rada made three draft laws on a language issue: 1) "On the Functioning of the Ukrainian Language as the State Language and the Procedure for the Use of Other Languages in Ukraine"; 2) "On the State Language"; 3) "On Languages in Ukraine". A journalist Taras Marusyk, Deputy Chairman of the Coordination Council for the use of the Ukrainian language in all spheres of life, analysed in detail the emergence and main content of each draft laws in one of his publications. He supported the draft law "On the State Language" personally, since it included the provision on the creation of the Language Inspectors Service (Marusyk, 2017a).

The TSN correspondents conducted their own analysis of the three draft laws, trying to find differences among them. First of all, they noted that in the programmes of the political forces that developed these documents there were quite different approaches to language issues. Hence, the programme brought in by Petro Poroshenko Bloc (BPP), in essence, was about observing Article 10 of the Constitution of Ukraine. The programme of the Svoboda Party declared the need to repeal the Kivalov-Kolesnichenko law and adopt the law "On Protection of the Ukrainian Language". The programme of the Solidarity party did not include the language issue at all. The journalists characterized the bill from the BPP as a political declaration. The content of the language bill from the Svoboda Party seemed "vague" to TSN correspondents. They were particularly critical of the use of the concept of "regional (minority) languages," which is not in the Constitution, but is in the Kivalov-Kolesnichenko law. There were noted ideas for the creation of certain institutions to protect state and regional languages among the positive aspects of the "Svoboda" bill. The most positive characteristics were given to the bill of the "Samopomich" party, which, however, did not mention the languages of the national minorities, since it was suggested developing a separate legislation for them. A favourable review was given to the suggestion of establishing the Institute of Language Inspectors, whose results were observed in the Baltic nations (Try horishky dlia movy, 2017).

Serhiy Hrabovskiy, a philosopher and writer criticized those political and public forces that oppose the adoption of the new language law on the Radio Liberty website in February of 2017. He accused them of defending the "Russky myr" ("Russian world"), criticized the Kivalov-Kolesnichenko law and the idea of bilingualism. In addition, the writer was for the Ukrainization, pointing out the threats from Putin's Russia. According to S. Hrabovskiy, if Ukraine had undergone the processes of Ukrainization since the 1990s, the so-called "Russkaya vesna" ("Russian Spring") would not have had supporters. He considered that the Ukrainian Armed Forces should be speaking the Ukrainian language as it was a particularly important matter. The writer even provided the example of Carl Mannerheim, who succeeded in ousting the Russian language from the Finnish army gradually (Hrabovskiy, 2017).

At the same time, there appeared an article by the famous Ukrainian publicist Vitaliy Portnykov about the destruction of the Library of Ukrainian Literature in Moscow by the Russian authorities. The author pointed at Russia's struggle against the Ukrainian language, schooling, and culture, at the frank, even boorish contempt of the Russians for the Ukrainian language, the desire to marginalize it, to push it out of the city into the countryside, and to associate it with an inferiority complex. The article also included the national invective: "The Russian people supported the chauvinistic efforts of their empire, were the bearers of Russification – and that is why, Russia achieved such a killer success. That is why, the Ukrainian language became the language of the "aborigines" in its own country," wrote V. Portnykov. He also appealed to the Russian-speaking Ukrainian patriots to learn Ukrainian, or at least create conditions for their children and grandchildren to speak this language. The publicist saw Ukraine's cultural issue not in the alleged inferiority of the Ukrainian culture, but in attempts to compete with Russia in the Russian-speaking space. In the author's opinion, the Russian-speaking Ukraine will always be the Russian region, and the Ukrainian-speaking Ukraine will always be a country (Portnykov, 2017a).

In the media a famous writer Andriy Liubka spoke in support of the draft law No. 5670 on ensuring the functioning of Ukrainian as the state language the next day (on February 19, 2017). He emphasizes that the law is aimed at the future, as it is aimed at young people and goals to grow a "crop/breed of the Ukrainian-speaking citizens". The writer emphasizes that the law is designed to create mechanisms through which the Ukrainian language will develop in a globalized world as it was recognized strategically. At the same time, A. Liubka appealed to the Russian-speaking Ukrainians with a request to support the draft new law, as it will allow their children to know the Ukrainian language (Liubka, 2017).

Professor Larysa Masenko drew attention to the continuation of the Russification trends in Ukrainian cities. L. Masenko noted that in many cities the Russian-speaking environment formed during the 1930s – 1980s and it still functions, hence, when entering it, the Ukrainian-speaking people switch to communicating in Russian. The scholar saw the signs of the language conflicts aggravation in Ukraine, commenting on the case in Dnipro, when a saleswoman chased out of a store a Ukrainian-speaking woman, the widow of a soldier killed in the ATO. L. Masenko updated the thoughts of the famous linguist Yuriy Sheveliov about "language in attack" and "language in retreat", criticizing the policy of the Ukrainian authorities for implementing the principle of bilingualism, which is supposed to ensure the consolidation of the country. The scholar made her position clear and spoke out sharply against the Kivalov-Kolesnichenko law and gave examples of the language policy in Finland and Israel. It was possible to carry out the Finnishization over several decades, where the Finnish language was almost ousted. In the second country, the authorities managed to revive and establish the Hebrew as a national means of communication for the multilingual Jewish environment. The example of France was also interesting, which did not ratify the European Charter for Regional or Minority Languages, recognizing it as contrary to the Constitution. Hence, the scholar led to the idea of inexpediency of constantly looking back at this document in the state that strives for the national independence and security. L. Masenko called on the Verkhovna Rada to adopt the law "On the State Language", which provided for the creation of an institution with the function of monitoring the implementation of the language legislation (Masenko, 2017).

The attempts of the pro-Russian forces to criticize language policy in Ukraine, to sow distrust among the Ukrainian authorities, and to denigrate bills on the functioning of the state

language were noticed by the above mentioned T. Marusyk. He determined a semantic and contextual connection between the statements of the Russian politicians and the civil servants (for example, the representative of the Russian Foreign Ministry M. Zakharova) and the pro-Russian “public” activists in Ukraine in one of his articles in March of 2017. The journalist focused on the authors of the Kolesnichenko-Kivalov law and their assistants. He argued that the assistants of these former people’s deputies continue their activities under modern conditions, and some of them spread the Kremlin’s narrative that it was the repeal of the Kivalov-Kolesnichenko language law that led to the war (Marusyk, 2017b).

T. Marusyk also focused on the issue on the certification of the civil servants for their proficiency in the Ukrainian language, in accordance with the amendments to the Law “On Civil Service” (2015). According to it, from May 1, of 2017, the officials had to submit a document on their proficiency in the state language. The journalist criticized the government resolution No. 301 of April 26, 2017, which regulated the organization of certification, highlighting the following shortcomings: 1) the certification was entrusted to authorized HEIs, and not to a state body, for example, the National Agency for Civil Service; 2) the organization of work and control over the certification was entrusted to the Rectors of HEIs (higher educational institutions); 3) the Secretary of the Certification Commission was appointed by order of the Rector from among the HEIs employees, and, hence, depended on the decision of the management. T. Marusyk saw corruption risks in these shortcomings (Marusyk, 2017c).

In June of 2017, more than 80 Ukrainian scholars, writers, journalists, public activists, volunteers, and publishers wrote an open letter in the media, calling for support and adoption of the updated draft law No. 5670d “On Ensuring the Functioning of the Ukrainian Language as the State Language”. There were the following signatories: Dmytro Pavlychko, Mykola Zhulynsky, Pavlo Hrytsenko, Larysa Masenko, Vitaliy Portnykov, Taras Marusyk, Ivan Malkovych, Yuriy Vynnychuk, Volodymyr Viatrovych, Vasyl Shkliar, Serhiy Kvit, Yuriy Makarov, Michael Moser, Yuriy Shevchuk, and the others. In the letter it was emphasized that the updated bill gives Ukraine a chance to form a holistic system for the protection and development of the Ukrainian language. Since the Ukrainian language is an important element of the constitutional order, a factor of the state unity and the national security, its adoption, in the opinion of the signatories, was an urgent duty of Parliament (*Zakon pro ukrainsku movu*, 2017). However, Parliament returned to considering the draft language law only two years later, when the next Parliamentary elections were about to take place. Hence, on April 23, 2019, the letter was published in some media again (*Movnyi zakon*, 2019). The Verkhovna Rada adopted the Law of Ukraine “On Ensuring the Functioning of the Ukrainian Language as the State Language” two days later.

The development of the bill on the functioning of the Ukrainian language did not go unnoticed by the media. TSN correspondents analysed the general provisions of the document before its consideration during the second reading, noting a number of innovations: proficiency in the Ukrainian language by the state officials, creation of the institution of the Commissioner for the Protection of the State Language, formation of the National Commission on State Language Standards, increasing the share of Ukrainian broadcasting on radio and television, the Ukrainian-language films and series on the Ukrainian television, print media, printing by publishing houses of at least 50% of book titles, holding public events in the state language, the service sector communicating in Ukrainian (*Rada hotuietsia*, 2019). A detailed description of the circumstances surrounding the adoption of the above-mentioned

law is presented in an article by a journalist Maria Vasylieva. The author cited quotes of the politicians, who emphasize that language is a matter of the state security (Vasylieva, 2019).

The adoption of the new language law again caused a different, sometimes polar reaction among the public and political forces, which was reflected in the Ukrainian mass media vividly. Soon, TSN reported that the Venice Commission criticized the Ukrainian language law, recommending that Ukraine postpone its entry into force. According to the Commission members, the law does not maintain a balance between protecting the state language and guaranteeing the rights of the national minority languages. (Venetsiiska komisiia, 2019). The opposition deputies and the pro-Russian politicians filed a lawsuit with the Constitutional Court of Ukraine regarding the constitutionality of the new law.

In January of 2021, those articles of the law on the functioning of the state language came into effect, which obliged the service sector to switch to the Ukrainian language. In this regard, a journalist Oleksandr Romaniuk reflected on the readiness of the service sector for language changes in the TSN story on January 15, 2021. In addition, he noted the introduction of the Ukrainian language exams for the officials. Together with the language Ombudsman Taras Kremin, he visited one of Kyiv supermarkets to find out more about the preparation for the the new rules' implementation. It turned out that the administration of the supermarket paid due attention to the language requirements (Romaniuk, 2021).

The media also raised the issue of the need for a separate law on the minority languages. President Volodymyr Zelensky raised this issue in an interview with the media, speaking about the need to regulate legally the rights of the minority representatives in Ukraine at the end of August in 2019 (Bud-yake rishennia, 2019). However, Russia's full-scale war against Ukraine put these projects on hold.

One of the most important issues discussed in the media during the period under review was the issue of introducing language quotas for the radio and television. O. Kurinnyi, a political scholar presented the results of a survey conducted by the "Obozrevatel" website on "Hromadske Radio", which was aimed at the Russian-speaking audience in April of 2016. It turned out that 80% of respondents (the sample consisted of 14 thousand people) supported the use of the Ukrainian language in television and radio. At the same time, 53% of respondents supported entirely the Ukrainian-language content, and 27% supported the introduction of a norm on the use of the Ukrainian language in at least 70% of television and radio (Naselechia, 2016).

On the other hand, the Ukrainian scholars and experts did not always agree to the very formulation of the issue on the language quotas. Hence, the director of the Institute of the Ukrainian Language of the National Academy of Sciences of Ukraine, Pavlo Hrytsenko, expressed the opinion that the introduction of quotas would not solve the issue regarding the use of the Ukrainian language. He emphasized that the Ukrainian language had never received the right to function as a state language in independent Ukraine. The scholar called the quota of the Ukrainian language on television and radio a slap in the face of the Ukrainian people. P. Hrytsenko interpreted the use of two languages, albeit with greater opportunities for the Ukrainian, as an "unacceptable model" that leads to "linguistic mutilation". He called the idea of a gradual increase in the Ukrainian language in the information space due to quotas false, because the functional field of the Ukrainian language should not be expanded, but changed. He pointed out the need to create radio programmes in the languages of the national minorities living compactly in a certain territory, but he considered the change from Ukrainian to Russian on the air unacceptable, since this would lead to the involvement of the Ukrainians in the Russian cultural space (Hruzdiev & Hlukhovskyyi, 2017).

In May of 2017, the Verkhovna Rada approved a law according to which at least 75% of the content of the national and regional TV channels must be broadcasted in Ukrainian. A requirement of at least 60% of the Ukrainian-language airtime was introduced for the local TV channels. It was allowed 10% of the text in another language in films, but with the subtitles. A journalist Yana Polianska collected a number of comments from the politicians regarding the new law. Some of them expressed reservations because the monitoring of channels regarding the fulfillment of quotas will take place not daily, but once a week, which will allow them to insert Russian productions at prime time, and the Ukrainian ones at less favourable time. The quotas will be fulfilled formally, but the influence of the Russian content will remain intact. MP Mykola Kniazhytsky notes that the law will be efficient only in a year. During this time, non-Ukrainian programmes, but with the Ukrainian subtitles, will be counted towards the Ukrainian quota. The law was opposed by deputies from the “Opposition Bloc”, who interpreted it as additional restrictions and expressed concern that Soviet films would be broadcast with the Ukrainian dubbing. It is important that Ya. Polianska cited the results of monitoring by the National Council for Television and Radio Broadcasting for March of 2017. It turned out that on some TV channels the percentage of the Ukrainian-language product was extremely low: “Inter” and “Ukraine” – 26%, K2 – 36%, “Enter Film” – 39%. (Polianska, 2017). President P. Poroshenko signed a law on language quotas on television in early June of the same year (Poroshenko pidpysav, 2017).

After that, the issue on the language quotas continued to be discussed in the media for some time. For example, a journalist Vitaly Portnykov discussed the impact of the law on the language quotas on the development of the Ukrainian-language television along with media lawyers Yuriy Krainiak and Ihor Rozkladai. I. Rozkladai pointed out that 10 years earlier, the license of each TV channel provided for the broadcast of at least 75% of the Ukrainian-language content. However, this requirement was later removed from licenses, as there was a “rollback” to the Russian-speaking environment due to the adoption of the Kivalov-Kolesnichenko law. According to the lawyer, “we are restoring language justice” nowadays. He provided the example of Poland, where there are also the language quotas, and also emphasized the need for their introduction, especially for the younger generation of the Ukrainians. He rejected the thesis about the alleged oppression of the Russian and other languages in Ukraine, emphasizing that the quotas for the foreign-language products allocated by law are quite sufficient for the development of the language and culture of the national minorities in Ukraine. The lawyer also denied the idea that the quota principle would lead to the loss of part of the audience by TV channels. Yu. Krainiak called the introduction of the language quotas “an inoculation from Russia” and pointed at “the creation of a cultural Ukraine in the form in which it could exist” (Portnykov, 2017b).

The quota approach had effect on the production of TV series on the Ukrainian TV channels. The online publication “Telekrytyka” published the words of Olena Yeremeieva, a producer of TV series and films on the 1+1 Channel at the beginning of 2020, that the Ukrainian language is used mainly in comedy series, since it is “more difficult to adapt” to a genre such as melodramas, which are filmed and shown in Russian. At the same time, the producer of this TV channel, Maksym Kryvytsky, complains that the Ukrainian-language series cannot be sold abroad and are needed only to meet the needs of the established Ukrainian-language quota (Smekh i slezy, 2020). The above-mentioned words provoked criticism in the media, that is why, O. Yeremeieva was in a rush to explain her words, stating that they were taken out of the context (Ukrainska mova, 2020). In July of 2021, the Language

Ombudsman Taras Kremin monitored the law implementation on the functioning of the state language by the Ukrainian TV channels. The monitoring results showed that six TV channels (“Inter”, “Ukraina”, “ICTV”, “Meha”, “NTN”, “K1”) violated the law by showing the Russian-language series and films. The “Ukrinform” agency reported this information, spreading the Ombudsman’s call, which was addressed to TV channels, to comply with the language legislation strictly (Inter, 2021).

The language policy of the Ukrainian governments, as is known, was closely related to the issues in the educational sphere. The results of the External Examination (ZNO) showed that a significant part of the national minorities representatives could not pass the Ukrainian language test in order to enter the Ukrainian higher education institutions. At the end of August of 2016, “Radio Svoboda” journalist Iryna Breza published an article about the issues on the language education of Transcarpathian schoolchildren, 27% of whom were unable to pass the External Examination (ZNO) in the Ukrainian language with a minimum passing score. The results of graduates of certain schools were impressive, 80% of whom did not pass the tests in the Ukrainian language and literature (Breza, 2016).

The initiative of the Ministry for Education and Science of Ukraine, headed by Liliia Hrynevych, was aimed at correcting the unsatisfactory level of students’ knowledge at schools with the languages of instruction of the national minorities, which was not left behind by the media. The Ministry for Education and Science sent a letter to the educational institutions, in which it was emphasized that pedagogical and scientific pedagogical employees must use the Ukrainian language in those institutions where the educational process is conducted in Ukrainian back in October of 2016. It was allowed, in addition to Ukrainian, to use the language of the national minority in the institutions with the languages of instruction of the national minorities (Minosvity vymahaie, 2016).

According to the Law of Ukraine “On Education”, which was adopted in May of 2017, the educational process could be conducted in the language of the national minorities at the level of the state primary school, but from the 5th grade, the volume of studying all subjects in Ukrainian should be increased. Immediately, the media reported on the foreign countries admonitions regarding the language component of the educational process in Ukraine. It should be noted that such concerns existed earlier: L. Hrynevych reassured the public, emphasizing the preservation of the national minorities’ rights to receive education in their native language back in April of 2017. At the same time, she made a remark that the national minorities’ schools often do not provide good knowledge of the state language (Hrynevych: shkoly, 2017).

The Ukrainian media recorded the international reaction to the Ukrainian law on education carefully, reporting, for example, the negative reaction of Poland, Moldova, Russia, Romania. The Ministry for Education and Science of Ukraine had to use the media to dispel the fears of foreign partners. Deputy Minister P. Khobzei noted on the air of the “Hromadske Radio” on September 7 of 2017 that there were 5 Polish schools in Ukraine, 176 Hungarian schools and about the same number of the Romanian schools, 1 Slovak school, which will continue to operate. The Ukrainian language legislation meets the requirements of the European Charter for Regional or Minority Languages (Chy zmozhut, 2017).

The Ukrainian media covered various positions of the Ukrainian politicians, experts, cultural and artistic figures on the language aspect of education in Ukraine. Hennadiy Moskal, the Head of the Zakarpattia regional state administration, called on President P. Poroshenko to veto the law on education and return it for revision to the Verkhovna Rada on September 8, 2017. According to the official, the law contradicted the European Charter for Regional

Languages and violated a number of bilateral agreements between Ukraine and neighbouring states. He spoke out against the restriction of the languages of the national minorities and at the same time spoke about the protection of the Ukrainian language (Moskal zaklykaie, 2017). Taras Marusyk, a language expert and member of the Public Council for the Protection of the Ukrainian Language, on the other hand, supported the Minister for Education L. Hrynevych, who stated the constitutionality of the language norms in the law on education, since they were transferred from the Constitution of Ukraine. T. Marasuk emphasized that the new law guarantees people belonging to the national minorities the right to education in their native language in preschool and primary education institutions. The right to education in their native language is also guaranteed at the secondary school level for the representatives of the indigenous peoples. The expert considered a different approach to the indigenous peoples and the national minorities to be justified and even positive. The statements of the Romanian and the Hungarian officials were interpreted as interference in Ukraine's internal affairs by him (Kostiuk, 2017).

The statements of the Ukrainian educators disseminated in the media were quite eloquent. For example, the director of school No. 147 in Kyiv, Serhiy Horbachov, supported the language norm of the law on education in general, although he emphasized that the situation of bilingualism is typical of many countries. He saw the reasons for the sharp criticism from Hungary and Romania in the fact that both countries are "accustomed to educating children at the expense of the Ukrainians", who cannot socialize in Ukraine. Natalia Shulha, an expert from the "Reanimation Package of Reforms" group, addressed the students' parents, who were against the language norm of the implemented law. According to her, a child's access to a higher education should not be restricted, as due to their limited proficiency in the Ukrainian language, it becomes an obstacle to the educational and career self-realization of graduates of schools with languages of the national minorities (Tymoshenko, 2017). The journalists asked teachers about practical aspects of implementing the language provision of the law after President Poroshenko signed the Law "On Education". The Principals and teachers of the Romanian and the Russian schools supported the language article of the Law "On Education" generally (Moskvychova & Pautov, 2017; My zhyvemo, 2017).

On the other hand, there were heard the protests of both pragmatic and historical legal format in the mass media. In particular, the opinion was expressed that Russian-speaking taxpayers have the right to receive education in Russian in state educational institutions. There were also appeals to the history of the Ukrainian language legislation. Hence, one of the residents of Kyiv recalled the norms of the Third Universal of the Ukrainian Central Rada (Council), which spoke about four state languages (Tymoshenko, 2017).

However, the unfavourable outcomes of Transcarpathian school graduates on the External Assessment (ZNO) in the summer of 2017 once again aided the advocates of the language article of the Law "On Education". A journalist Oleksandr Havrosh provided examples of a poor performance. External Assessment (ZNO) in the Ukrainian language was failed by 63% of school graduates in Berehove district, where 75% of the population is Hungarian. In some cases, schoolchildren cannot even fill out an application for the External Assessment (ZNO) in Ukrainian on their own. O. Havrosh explained the changes that would be implemented in accordance with the new law, and, importantly, provided an example of similar approaches in the European countries. According to him, there is a similar system in Slovakia, where, in particular, in the T. Shevchenko Ukrainian gymnasium, several school subjects are taught in Ukrainian, all the rest in Slovak. Hence, the journalist called for "taking care of your

own interests, not your neighbours”, and also noted the following: there are approximately 150 schools (i.e. on average, one school per 1 thousand population) for 150 thousand Hungarians in Transcarpathia; in contrast, there is not even one class for five thousand Ukrainians in Hungary. The situation is even worse in Russia, where for several million Ukrainians there is not a single educational institution with the Ukrainian as the language of instruction. There is only one Ukrainian-language educational institution for 51 thousand Ukrainians in Romania, i.e. the T. Shevchenko Lyceum in the city of Sighetu Marmatei, while there are 150 schools with Romanian as the language of instruction for 150 thousand Romanians in Ukraine. Another statistic published by O. Havrosh was also interesting: almost 75% of graduates of schools in Berehove district failed at the Mathematics examination tests during the External Assessment (ZNO), and 71% failed at the English language examination tests. But they studied these subjects in Hungarian and passed the External Assessment (ZNO) in this language as well. Hence, the journalist noted reasonably that the level of education in the Hungarian-language schools left much to be desired. The decrease in the number of students in the Hungarian-language schools causes concern, since the Hungarian minority is gradually emigrating from Ukraine. According to O. Havrosh, the Ukrainian state should not care about training personnel for Hungary, but instead take care of its own interests (Havrosh, 2017).

The Venice Commission supported the language component of the Law “On Education” in December of 2017, making certain recommendations (in particular, to exempt private schools from new requirements regarding the language of instruction). A detailed and analytical article dedicated to the decision of the Venice Commission and the prospects for the “language confrontation” between Ukraine and Hungary was dedicated by the editor of “European Pravda” Serhiy Sydorenko in December of 2017. He noted that Ukraine did everything possible to reach out to the Hungarians, while Budapest chose a position of information isolation (Sydorenko, 2017).

The Conclusions. Thus, the Ukrainian mass media focused on the language policy issues in Ukraine. The reasons for this were, on the one hand, the importance of resolving efficiently the issue on the ratio of the state language, the Russian language and the languages of the national minorities in Ukraine for the stability of society, on the other hand, aggravation of this issue under the conditions of the modern Russo-Ukrainian War, the ideological discourse of which included the myth of “oppression of the Russian language”. The Ukrainian mass media during the period under analysis (2014 – 2012) focused on three key manifestations of the language policy: 1) conflicts regarding the abolition of the conflict-generating language law of 2012 (the Kivalov-Kolesnichnek law), as well as the development and public adoption of a new law on languages in Ukraine; 2) discussions on the legislative introduction of the language quotas for television, radio, and book publishing; 3) internal and external disputes about the language article of the law “On Education”. It should be recognized that the majority of the Ukrainian media outlets supported the language policy of the Ukrainian governments regarding the establishment of Ukrainian as the state language in Ukraine, although they tried to adhere to objective coverage of events and interpretation of the positions of political forces.

Acknowledgements. We express sincere gratitude to all members of the editorial board for consultations provided during the preparation of the article for publishing.

Funding. The authors received no financial support for the research, authorship, and/or publication of this article.

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*The article was received January 17, 2024.
Article recommended for publishing 29/11/2024.*

РЕЦЕНЗІЇ / REVIEWS

UDC 94(477)“20”:316.344.42(477)
DOI 10.24919/2519-058X.33.317483

Volodymyr KOMAR

PhD hab. (History), Professor, Head of the Department of History of Central and Eastern Europe and Special Branches of Historical Science, Vasyl Stefanyk Precarpathian National University, 57 Shevchenko Street, Ivano-Frankivsk, Ukraine, postal code (volodymyr.komar@pnu.edu.ua)

ORCID: 0000-0002-5475-5084

Olha YASKEVYCH

PhD (Philology), Associate Professor of the Department of English Language and Translation, Drohobych Ivan Franko State Pedagogical University, 24 Ivan Franko Street, Drohobych, Ukraine, postal code 82100 (olyasko1@gmail.com)

ORCID: 0000-0002-3874-836X

Володимир КОМАР

доктор історичних наук, професор, завідувач кафедри історії Центральної та Східної Європи і спеціальних галузей історичної науки, Прикарпатський національний університет імені Василя Стефаника, вул. Т. Шевченка, м. Івано-Франківськ, Україна, індекс 82100 (volodymyr.komar@pnu.edu.ua)

Ольга ЯСКЕВИЧ

кандидатка філологічних наук, доцентка, доцентка кафедри англійської мови та перекладу, Дрогобицький державний педагогічний університет імені Івана Франка, вул. І. Франка, 24, Дрогобич, Україна, індекс 82100 (olyasko1@gmail.com)

THE UKRAINIAN ELITE IN MODERN AND CONTEMPORARY HISTORY: A NEW STUDY IN THE FIELD OF SOCIAL HISTORY

(peer-review of the collective monograph: The Ukrainian Elite in the Second Half of the 19th – the Beginning of the 21st Centuries: Formation Features, Transformation of Ideas, Intellectual Potential. Western Lands. Selected Issues / ed. Ihor Soliar, compiled by Oleh Muravsky, Mykhailo Romaniuk; NAS of Ukraine, I. Krypiakievych Institute of Ukrainian Studies. Book 1. Lviv, 2023. 536 p.

УКРАЇНСЬКА ЕЛІТА У НОВІЙ І НОВІТНІЙ ІСТОРІЇ: НОВЕ ДОСЛІДЖЕННЯ У РІЧИЩІ СОЦІАЛЬНОЇ ІСТОРІЇ

(рецензія на колективну монографію: Українська еліта у другій половині XIX – на початку XXI століття: особливості формування, трансформація уявлень, інтелектуальний потенціал. Західні землі. Вибрані проблеми / від. ред. Ігор Соляр, упоряд. Олег Муравський, Михайло Романюк; НАН України, Інститут українознавства ім. І. Крип'якевича. Кн. 1. Львів, 2023. 536 с.)

In 2023, in the Ukrainian humanities a landmark event was the appearance of the collective monograph “The Ukrainian Elite in the Second Half of the 19th – the Beginning of the 21st

Centuries: Formation Features, Ideas Transformation, Intellectual Potential. Western Lands. Selected Issues”, which was prepared at the I. Krypiakevych Institute of Ukrainian Studies of the NAS of Ukraine (a responsible editor – director of the Institute, Doctor of Historical Sciences, Professor Ihor Soliar). The monograph covers various historical periods, from the end of the 19th century and the Ukrainian Revolution to the present day, emphasizing the complexity of the national elite formation taking into account external and internal factors, including Russification, pseudo-elite and a low public trust in government structures.

The appearance of the collective monograph at the time of the full-scale invasion of the Russian Federation is not accidental. Russia's invasion in Ukraine became a catalyst for a possible rethinking of the elite's role and the problem of its consolidation on the issues of preserving statehood. In the collective monograph, in particular, there are characterized the contradictory processes of the formation and evolution of the Ukrainian elite in Western Ukrainian lands in the second half of the 19th – the beginning of the 21st centuries; retrospectively there are analysed the essence, socio-historical genesis, stages and models of elite formation at the end of the 19th – the beginning of the 20th centuries, the period of the Liberation Struggles, the interwar period of the 20th century and modern Ukraine; the peculiarities of the political elite rotation processes in Ukraine are researched, its ethnic and social characteristics and generational potential are shown; a significant focus is on the issue of interaction between central and regional political administrative elites of modern Ukraine, the influence of regionalization on state-building processes is shown, and the role of party structures in the process of elite formation is defined.

Methodologically the collective monograph is based on the Western tradition of elite research (Vilfredo Pareto (1848 – 1923), who introduced the concept of “circulation of elites”; Gaetano Mosca (1858 – 1941), who developed the concept of “political class”; Robert Michels (1876 – 1936), the author of the law of oligarchization; Charles Wright Mills (1916 – 1962), who studied the power structures of the United States, etc., the Ukrainian socio-political thought (Dmytro Dontsov (1883 – 1973), who emphasized the importance of creating a strong national elite; Viacheslav Lypynsky (1882 – 1931), the author of the concept of the elite as the driving force of state formation; Ivan Lysiak-Rudnytskyi (1919 – 1984), who emphasized the role of the intellectual elite in the national identity formation, etc.), as well as scientific achievements of the contemporaries (Borys Kukhta, Natalia Teploukhova, etc.), achievements of leading scholars of the I. F. Kuras Institute of Political and Ethno-National Studies of the National Academy of Sciences of Ukraine, the Institute of History of the National Academy of Sciences of Ukraine, the I. Krypiakevych Institute of Ukrainian Studies of the National Academy of Sciences of Ukraine, etc.

The idea of the need to rethink the role of the Ukrainian elite in the processes of state formation runs through the collective monograph. At the same time, the focus is on the influence of elites on national identity and democratic processes. In this context, it is worth noting that the monograph is distinguished by a clear and thoughtful structure. In Part I “The Phenomenon of the Ukrainian Elite,” there are analysed the issues of the “Identity Wars” as a challenge for the Ukrainian elites (Yaroslav Kalakura, Oleh Kalakura), “The Intellectual Elite and Book Culture of Galicia (Roman Holyk). The focus is on the fact that the absence or uncertainty of the leadership role of elites, their excessive politicization leads to a mutual struggle and becomes the cause of identity crises, conflicts and “wars”. Overcoming these and other shortcomings, increasing the role of the state and civil society in the identification process will contribute to the formation of a new quality of elites and identities, their understanding between themselves for the sake of consolidating the Ukrainian society, achieving Victory over the internal and external enemy.

Among the chapters of Part II (“Ukrainian Elite during the Period of Nation- and State-building Processes of the Second Half of the 19th – the Beginning of the 20th Centuries”),

the studies by Oleksandr Muzychko “Interactions of the South Ukrainian and West Ukrainian Intellectual Elite in the Second Half of the 19th – the Beginning of the 20th Centuries”, Myroslava Novakovych “The Role of the Musical Elite in the Cultural and Political Life of Galicia in the Second Half of the 19th – the Beginning of the 20th Centuries”, Valentyna Hoshovska “The Leading Role of the Ukrainian Elite in the Formation of National Social Democratic Thought (the end of the 19th – the beginning of the 20th centuries)”, Ruslan Piroh “The Ruling Elite of the Ukrainian State in 1918: Issues of National Identification”, Ivan Pater “The Ukrainian Political Elite during the Great War: between National Consolidation and Political Confrontation”, etc. are of a particular relevance. The latter, in particular, noted that by the end of 1918, i.e. after the end of the Great War, political figures in Galicia and the Dnieper region believed that their main and highest goal had been achieved, since independent Ukrainian state had been formed, national and social oppression had been eliminated, conditions had been created for the revival and powerful development of the nation, and then a new stage in the struggle for the Ukrainian statehood in other forms and conditions was coming. After the end of the liberation struggles of 1917 – 1921, the majority of the Ukrainian political elite, without betraying their convictions, made many efforts to restore the Ukrainian state.

Of great interest is the third part of the collective monograph “The Elite of the National Liberation Movement of the 1920s – 1950s”, co-authored by Vasyl Futala (“The Political and Military Elite of the Ukrainian National Liberation Movement of the 1920s – 1950s: Modern Ukrainian Historiography”), Oksana Ruda (“The Ukrainian Political Elite in Defense of National Interests in Parliament of Interwar Poland (1922 – 1939)”), Iryna Skalska (“Models of Formation and Work of the Ukrainian Elite of Western Volhynia (1921 – 1939)”), Oleksandra Stasiuk (“The OUN Policy Regarding Involvement of Intelligentsia in Underground”), Oleksandr Lutsky (“The Intelligentsia of Western Ukraine in 1939 – 1941: between Adaptation and Resistance”), Vasyl Ilnytskyi (“The Leading Members of the Carpathian Regional Leadership of the OUN (1945 – 1954): Structure, Organizational Responsibilities, Social Portrait”), etc.

It is worth mentioning the opinion of Vasyl Futala, who argued that in a new socio-political, spiritual atmosphere after the restoration of Ukrainian statehood, the names of those who fought for Ukraine’s independence were brought back from oblivion, and our history was enriched with its human dimensions. According to the scholar, despite significant success in studying the role of the political and military elite in the Ukrainian national liberation movement of the 1920s – 1950s, there is a need to continue doing the research. The scholar argues that historians have focused on key figures mostly – Ye. Konovalets, S. Bandera and R. Shukhevych, but academic biographies of these figures will have to wait. There are no book-format studies on four of the nine UPA generals – I. Klymiv, V. Mayivsky, L. Stupnytsky and I. Treik. We have little information about the UPA commanders and staff chiefs of the operational groups – Vasyl Ivakhiv, Petro Oliinyk, Ivan Lytvynchuk, Oleksandr Lutsky, Vasyl Sydor, Mykola Svystun, Vasyl Protsiuk, etc. The situation is similar regarding the commanders and chiefs of staff of military districts and tactical units – Mykola Yakymchuk, Yuriy Stelmashchuk, Ivan Butkovsky, Mykola Tverdokhlib, Bohdan Vilshynsky, Mykola Levytsky, Volodymyr Yakubovsky, etc. On the agenda there is the coverage of the life and combat path of dozens of commanders of kurens, hundreds and other grassroots units of the UPA. The scholar notes that knowledge about famous OUN figures, such as Roman Kravchuk, is far from complete.

Individual fragments of the Ukrainian elite evolution issue after the restoration of Ukraine's independence (Part IV) are revealed in the studies by Ihor Pidkova “Democratic Parliamentary Elite in the Processes of Sovereignization of the Ukrainian SSR: Institutional Formation, Socio-political Structure and Ideological Configuration”, by Mykola Vehesh,

Marian Tokar “Features of Formation and Development Trends of Transcarpathia Political Elite”, by Zoriana Hbur “Ukrainian Elite during the Russo-Ukrainian War of 2014 – 2023”, by Iryna Hrabovska, Mykhailo Tsiurupa “Military Elite of Ukraine: the Path of Ukrainian Women to Leadership”, etc. It is difficult not to agree to the thesis that the Ukrainian elite plays an important role in the Russo-Ukrainian war, which began in 2014 and continues to this day. In the monograph it is stated that at the beginning of the war, many Ukrainian elite groups, including businessmen, politicians, and intellectuals, felt threatened by the Russian aggression for their property and positions in the Ukrainian society. Many of them took responsibility for the defense of Ukraine and the fight against the Russian aggression, including financing the Ukrainian army, providing assistance to military hospitals and war victims, and participating in military operations. The book proves that it is the elite that shapes national identity and supports the Ukrainian language and culture, which is an important factor in Ukraine's resistance against the Russian aggression. Actually, in this way, the Ukrainian elite plays an important role in protecting the sovereignty and territorial integrity of Ukraine.

In general, having analysed the main parts of the collective monograph, we can conclude that the Ukrainian elite played a decisive role in the formation of national identity, statehood and cultural independence during the second half of the 19th – the beginning of the 21st centuries, however, its influence was often limited by external factors. The formation of the Ukrainian elite was affected negatively, in particular, by the processes of Russification, Polonization, as well as the Soviet ideology.

Without any doubt, the collective monograph creates a platform for an interdisciplinary dialogue on the Ukrainian models of elite formation, historical patterns and modern challenges, which is an important step for the development of the Ukrainian historical and political science. It is also gratifying that the publication is aimed at creating a theoretical basis for training new generations of the Ukrainian leaders who will be able to meet modern challenges and realize the state potential.

In Preface of the collective monograph, O. Muravsky notes rightly that it is impossible to characterize the contradictory processes of formation, establishment and evolution of the Ukrainian elite in Western Ukrainian lands in the second half of the 19th – the beginning of the 21st centuries in one book fully, taking into account the multifaceted nature of the term “elite”, which is used to designate a layer of society that is endowed with power and / or influence, resources, privileges, etc. For these reasons, according to the scholar, there is a need for a serial publication, which in the future would become a dialogical all-Ukrainian platform for studying a wide range of issues, among which the following thematic blocks should become dominant: the Ukrainian models of elite formation; features of the political elite rotation at the turning points of the 20th – 21st centuries; general trends in elite formation that unite the elites of the Ukrainian Revolution period, the interwar period of the 20th century and modern Ukraine; social features, a “generational code” and intellectual potential of modern elite; the influence of pseudo-elites on socio-political processes in historical and modern retrospect, etc. It is difficult to disagree to such a statement, which gives hope for the emergence of a series of publications on the analysis of the intellectual, economic and military elites functions, determining their influence on the development of democracy, social justice and social values formation.

*The article was received May 2, 2024.
Article recommended for publishing 29/11/2024.*

NOTES

НАУКОВЕ ВИДАННЯ

**СХІДНОЄВРОПЕЙСЬКИЙ
ІСТОРИЧНИЙ ВІСНИК**

**EAST EUROPEAN
HISTORICAL BULLETIN**

**ВИПУСК 33
ISSUE 33**

Головний редактор
Василь Ільницький

Відповідальний редактор
Микола Галів

Літературне редагування
Ірина Невмержицька

Редагування англomовних текстів
Віра Слінецька, Юлія Талалай

Технічний редактор
Лілія Гриник

Макетування та верстка
Наталія Кузнєцова

Дизайн обкладинки
Олег Лазебний

Здано до набору 16.12.2024 р. Підписано до друку 24.12.2024 р.
Гарнітура Times. Формат 70x100 1/16.
Друк офсетний. Папір офсетний.
Ум. друк. арк. 20,96. Зам. № 1224/875
Наклад 300 примірників

Друкарня – Видавничий дім «Гельветика»
65101, Україна, м. Одеса, вул. Інглезі, 6/1
Телефон +38 (095) 934 48 28, +38 (097) 723 06 08
E-mail: mailbox@helvetica.ua
Свідоцтво суб'єкта видавничої справи
ДК № 7623 від 22.06.2022 р.