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WOMEN AND ISLAM IN THE MEDIEVAL AZERBAIJAN

Abstract. Islamisation, changing all spheres of public life in Azerbaijan, did not bypass the gender aspect. In all subsequent periods of the medieval era, the role of women in public and in everyday life was determined by the Islamic Sharia law. In addition, local national traditions also had their own special influence on the status of women. **Purpose of the Research.** The status of women in medieval societies exhibited both universal patterns and distinct regional variations shaped by religious beliefs and local customs. These historical influences have created enduring cultural models of womanhood that continue to resonate in contemporary societies. In Azerbaijan, the notion of an “ideal Azerbaijani woman” remains a powerful social construct, reflecting centuries of interplay between local traditions and Islamic values. This research examines how the intersection of pre-Islamic Azerbaijani customs and Islamic practices has shaped gender roles and expectations in Azerbaijan, with particular attention to the persistence of these historical influences in modern conceptualizations of feminine identity. By analyzing this cultural synthesis, the study aims at understanding how traditional and religious elements have contributed to current perspectives on gender in Azerbaijani society. **Research Methodology.** Aiming to study the impact of Islam and dogmas of this religion on the gender issue in the case of Azerbaijan, this article sets the objectives of research both in historical and cultural anthropological perspectives. In this regard, the research benefits from using methods of these fields, alongside Islamic Studies and Gender Studies. Based on an interdisciplinary approach, in this respect the study primarily relies on the comprehensive analysis of the studies by historians, philosophers, and

theologians of the medieval period. Moreover, it considers wide-ranging studies from the contemporary period. **Scientific Novelty.** The role and status of women in Islam have been widely studied from historical and modern perspectives in the case of Middle Eastern countries. This paper is the first attempt to scrutinize this issue in the case of Azerbaijan. And being interdisciplinary, it contributes to various fields of study. **Conclusions.** The research findings demonstrate that women's roles in medieval Azerbaijan were multifaceted and nuanced, reflecting a complex interplay of Islamic principles, pre-existing cultural traditions, and contemporary socio-political dynamics. The historical synthesis of these influences created distinct patterns of feminine identity and social participation that continue to resonate in modern Azerbaijani society. This historical model of womanhood, characterized by both constraints and spheres of autonomy, remains influential in shaping current cultural expectations and gender norms in Azerbaijan.

Key words: Islam, Women, Gender Issue, Medieval Azerbaijan, Medieval Scholars, Image of Woman.

ЖІНКИ ТА ІСЛАМ У СЕРЕДНЬОВІЧНОМУ АЗЕРБАЙДЖАНІ

Анотація. Ісламізація, змінивши всі сфери суспільного життя в Азербайджані, не оминула і гендерний аспект. У всі періоди середньовічної епохи роль жінки в громадському і повсякденному житті визначалася ісламським правом шаріату. Крім того, особливий вплив на становище жінки мали і місцеві національні традиції. **Мета дослідження.** Статус жінки в середньовічному суспільстві демонстрував як універсальні моделі, так і чіткі регіональні відмінності, сформовані релігійними віруваннями та місцевими звичаями. Ці історичні впливи створили стійкі культурні моделі жіночості, які продовжують резонувати в сучасних суспільствах. В Азербайджані поняття “ідеальна азербайджанська жінка” залишається потужним соціальним конструктом, що відображає багатовікову взаємодію між місцевими традиціями й ісламськими цінностями. У пропонованій статті розглядається, як перетин доісламських азербайджанських звичаїв та ісламських практик сформував гендерні ролі й очікування в Азербайджані, зосереджуючи особливу увагу на стійкості цих історичних впливів у сучасних концептуалізаціях жіночої ідентичності. Аналізуючи цей культурний синтез, розвідка має на меті зрозуміти, як традиційні та релігійні елементи вплинули на сучасні погляди на гендер в азербайджанському суспільстві. **Методологія дослідження.** З метою вивчення впливу ісламу та догматів цієї релігії на гендерне питання на прикладі Азербайджану, стаття ставить завдання дослідження як в історичній, так і в культурно-антропологічній перспективах. У зв'язку з цим дослідження виграє з використанням методів цих галузей, поряд з ісламознавством та гендерними студіями. Bazуючись на міждисциплінарному підході, автори передусім посилаються на комплексний аналіз праць істориків, філософів і теологів середньовіччя. Крім того, враховують широкий спектр досліджень сучасного періоду. **Наукова новизна.** Роль і статус жінки в ісламі широко досліджувалися в історичній перспективі та сучасності у випадку країн Близького Сходу. Ця стаття є першою спробою детально розглянути це питання щодо Азербайджану. І будучи міждисциплінарним, він сприяє різноманітним галузям дослідження. **Висновки.** Результати дослідження демонструють, що ролі жінок у середньовічному Азербайджані були багатограними та різноманітними, відображаючи складну взаємодію ісламських принципів, культурних традицій, що існували раніше, і сучасної соціально-політичної динаміки. Історичний синтез цих впливів створив чіткі моделі жіночої ідентичності та соціальної участі, які продовжують резонувати в сучасному азербайджанському суспільстві. Ця історична модель жіночості, яка характеризується як обмеженнями, так і сферами автономії, і сьогодні впливає на формування сучасних культурних очікувань і гендерних норм в Азербайджані.

Ключові слова: іслам, жінки, гендерне питання, середньовічний Азербайджан, середньовічні вчені, образ жінки.

Problem Statement. The status of women in the medieval period, particularly in the context of Islam, had a complex character within society, shaped by cultural, religious, and

socio-political factors of the time. The medieval Islamic period in Azerbaijan, generally spanning from the 7th century to the 15th century, witnessed the rise of Muslim governance and cultural influences, significantly impacting on the roles and representation of women in public life. Many aspects of the issue, from marriage and managing household to cultural contributions, have been widely studied in the context of the Middle East. However, the local context, traditions, customs and other cultural factors, had its own influence on the roles that women played in the political and cultural life of medieval society. This local context mixed with the Islamic concept of public life has its particularities in the case of Azerbaijan, which included territories of northern Iran and Eastern Caucasus. The scrutiny on the medieval textual sources reveals a more intricate picture of medieval Azerbaijan. Being interdisciplinary in nature, this research seeks to shed light on the issue through interaction of such fields as History and Gender Studies.

The purpose of this article consists in the understanding how the integration of Islamic principles with local customs, pre-Islamic traditions, and socio-political structures shaped the lived experiences of women, and to what extent interpretations of Islamic texts and teachings impacted women's public positions. Moreover, it attempts to clarify in what scale the medieval Muslim thinkers, whose works contain more conservative than progressive thoughts regarding marriage, inheritance, and women's participation in public life, had an effect on the society in the Azerbaijani context.

Review of Recent Research and Publications. Research on women in Islam is a vast and complex field, marked by both significant progress and ongoing debates. The topic has garnered increasing attention in recent decades, leading to a rich body of scholarly work. One of the key debates and challenges around the gender issue in Islam arose after the publication of Edward Said's "Orientalism" (Said, E., 2003), first published in 1978. Building on E. Said's a new vision of the East, critics contend that much of the research on Muslim women is influenced by Western perspectives and stereotypes, leading to a distorted view of Islamic teachings and women's experiences. Under the light of E. Said's new philosophical approach, some positive thoughts were observed in the literature. The idea is put forward that after the emergence of Islam, Arabian society needed the contribution of women in social and economic life, thus, it allowed them corresponding visibility and social power (Wiebke, 2006, p. 6). Leila Ahmed in "Women and Gender in Islam", first published in 1992, claims that the widespread oppressive practices faced by women in the Middle East result from the dominance of patriarchal interpretations of the Quran (1992).

Nikki R. Keddie in her study analyses of views regarding women Middle East in the early Islamic period, assessments of the role of the Turks and Mongols, analyses of Ottoman court records (Keddie, 2007). Although the region of our study was not included, the work is important for the study of the problem as a whole. The gender aspect in connection with national identity in post-Soviet Azerbaijan was studied by N. Tohidi, but in her study the issue in a historical and religious context is not considered (Tohidi, 2021). The issue of Islam in a gender context was partially addressed in the study by Nikoloz Aleksidze (Aleksidze, 2024). Kristin Collins-Breyfogle's research deserves special mention (Collins-Breyfogle, 2011). Although her study dates back to the 19th century, the Tsarist colonial period, it contains a great deal of material on Caucasian Muslim women. As local customary nearly was preserved in whole from the medieval times, these findings have a great importance to our research.

The place and role of women in Islam have been widely studied in contemporary Turkish historiography (Aydin, Akif, 2001, 86–94; Duran, Hamiye, 2018, pp. 411–431). However, the

Azerbaijani context is often overlooked in these studies. Regarding the study of the women's issue in Azerbaijan itself, it should be noted that the “Encyclopedia of Women of Azerbaijan” and many studies dedicated to women who achieved great success in science, art, and public life of the country in different periods of history have been published (Azərbaycan Qadın Ensiklopediyası, 2002). Among them, Naila Velikhanli devoted an article to the role of women in the political life of the country during the Atabeks (Eldenizids) period (Vəlixanlı, N., 2022, pp. 31–41). However, the status of Muslim women in medieval Azerbaijan remains significantly understudied. Therefore, this study is aimed at supplementing research on this issue based on original medieval textual sources in Arabic and Persian.

Results of the Research.

Main Muslim Sources on Gender: the Quran and Early Islamic Texts. Seeking to illuminate interactions between gender, religion, and culture in a pivotal historical period, it is important to consider some Quranic and prophetic Interpretations on gender. This approach requires focusing on examining the primary Islamic texts to understand the original status and rights of women in Islam, as often these texts have been interpreted to justify discriminatory practices. To determine the status of women in society based on the Quran, four key issues need to be considered: gender equality/inequality, age of marriage that defines basis for child marriage problem, veiling, which is actually an issue of body control by men, and women's participation in public life. The Quran's verse in the surah “an-Nisa” states: “Men are in charge of women, because Allah has given one more than the other.” (The Quran, 4:34).

On the one hand, this verse calls on men to protect women, since they are created stronger, but on the other hand, it directly indicates the superiority of men over women. However, there is one nuance that needs to be paid attention to. When the verse states the superiority of some over others, it does not mean only women. According to the grammar rules of the Arabic language, the word “over others” is in the masculine gender, not feminine. In other words, the verse does not assert inequality between the sexes, but between people. Even though, in this context, the verse emphasizes the gender issue, and based on this, we must agree that the Quran indicates the superiority of men over women and calls women to obedience. However, the same surah's other verse proclaims equality between men and women: “And whoever does righteous deeds, whether male or female, while a believer – those will enter Paradise.” (The Quran, 4:124). The gender equality is also indicated in the surah “al-Imran” that male or female will be rewarded equally by their deeds and both are equal in reward (The Quran, 3:195). This suggests that stating about the superiority of one person over another (The Quran, 4:34), the Quran means physical and mental abilities, and of course, we can add class status in society, but not gender.

According to Muslim custom, the age of marriage for girls is 9 years old, based on the Hadiths. The most authoritative muhaddith, collector and compiler of hadith, is considered to be Imam Muhammad ibn Ismail al-Bukhari (810 – 870), who lived much later than the founder of Islam. Despite the controversy surrounding the age of the Prophet Muhammad's wife Aisha at the time of marriage, this issue is voiced differently in the Quran. The Quran's verse in the surah “an-Naba” mention “full-bosomed maidens of equal age”. (The Quran, 78:33). First of all, we see that a man and a woman must be of the same age in marriage, as indicated in the verse “equal age” or more less the same age. And “full-bosomed maiden” can be at least 15-year old girl.

Another Muslim custom is the requirement for women to be veiled. The Quran requires the women believers to guard their private parts and not to display their adornment [body parts],

except that which appears there and **to draw their veils over their chests** and not to display their adornment [body parts] (The Quran, 24:31). There is no direct reference to head covering in the Quran, but this verse shows that women of the Arabian Peninsula wore head coverings without religious requirements and because of this, veil mentioned in the verse. Most likely, due to natural conditions under the scorching sun, both men and women had to wear a special headdress. As it is known, still in the Arab tradition there is a special headdress for men.

It must be agreed with Leila Ahmed's point of view that the Quran has been interpreted from the position of patriarchal views and this has established gender relations for centuries in Muslim societies, including Azerbaijan. However the primary Muslim texts are interpreted, they support severe punishment for both sexes for adultery, as stated in Surah An-Nur "a hundred lashes" (The Quran, 2:12). In addition, Sharia law allows polygamy. All these moments create a realistic picture of medieval Muslim society.

The participation of women in the public life of the community is recorded in early Islamic sources. Early Islamic textual sources such as the Hadith and the works of Muslim scholars mention women names among the companions of the Prophet Muhammad (As'hab). Indirectly, this can be considered as recognition of women's participation in public life. In other words, if according to the community rules, women must be invisible in public, then glorifying women who supported the prophet and actively participated in strengthening Islamic society, makes no sense. One of the remarkable Islamic sources that glorify women companions of Muhammad is Ibn Al-Athir's "Usd al-ghabah fi marifat al-Sahabah", written around 1200. This work gives hagiographical description of women's participation in the struggle for establishment and expansion of Islam (Ibn Al-Athir, 2013).

The position of women in medieval Azerbaijan reflects a complex interplay between Islamic religious texts, which generally emphasize female modesty and adherence to religious norms, and pre-Islamic Turkic cultural traditions. This represents a significant shift from the customs of pre-Islamic Turkic societies, where women often held different social roles. The 12th-century poet Nizami Ganjavi provides valuable insights into this contrast through his work 'Iskandarnamah.' Having been married to a Kipchak woman, Ganjavi had firsthand knowledge of Kipchak customs and depicts their women as maintaining significant personal freedoms, including the practice of going unveiled and enjoying considerable social autonomy (Nizami, 2004, p. 314).

Interactions between Gender, Religion, and Culture in Azerbaijan in the Historical Perspective. Pre-Islamic Azerbaijan had a mosaic ethnic and religious composition. On the eve of the Arab conquest, Eastern Caucasus was home to various religious beliefs. In Shirvan, in the regions closer to the Caspian Sea, Zoroastrianism was presented as a religion of tangible number of population, which was implanted by the Sassanids and strengthened by their settlers. To the north and west, in Aran and Shaki, Christianity had a strong position and dominated. Judaism was most likely represented by the Jewish communities of the Caucasus. To this picture we must add the existence of various forms of idolatry beliefs throughout the Eastern Caucasus. As for Iranian Azerbaijan, where Zoroastrianism dominated, it should be noted that there was such a center of Zoroastrianism as Adurgushnasp. All these religious practices played a decisive role in shaping the image of women, creating cultural norms often dictated women's behavior and limited their choices, particularly regarding marriage and family life. Upon arrival of Islam in Azerbaijan the religious landscape gradually began to change in favor of a new religion, but local customs persisted and were mixed with Islamic tradition. By the way patriarchal gender roles in household were defined long before the

monotheistic religions, and in some rates still preserved. It should be noted that the vestiges of pre-Islamic beliefs influenced Islam in Azerbaijan, creating vernacular religion. (Aliyeva, 2013, p. 145). In its turn, this interaction of local tradition and Islam established a strong gender aspiration, which still more or less preserved.

The Oghuz epic “Kitabi Dede Korkut” provides valuable insights into the status of women in early Turkic Muslim society. The epic depicts women maintaining significant personal freedoms even after the adoption of Islam. Female characters in the narrative ride horses alongside men, participate in competitions, and move about freely without face coverings. These portrayals suggest that the initial spread of Islam among the Oghuz Turks did not immediately alter their traditional customs regarding women's roles and freedoms. The epic's representation of women engaging in activities typically associated with male domains indicates that gender relations among the medieval Oghuz were more fluid than in many other contemporary Muslim societies (Kitabi-Dədə Qorqud, 2004).

We do not have the opportunity to study gender issues in medieval Caucasian and Azerbaijani Muslim societies using direct sources. However, the patriarchal relations within the society were preserved as they in medieval times even after the Tsarist Russia invasion of the Caucasus in the 19th century. Thus, the Russian accounts give an authentic picture of the time. Kristin Collins-Breyfogle, using the reports from Russian archives, analyzed the gender issue in the Caucasus (Collins-Breyfogle, 2011). These research results provide us with the valuable insights.

According to K. Collins-Breyfogle's research, some Caucasian communities marriage age was as young as ten or twelve, and others as late as seventeen (Collins-Breyfogle, 2011, p. 33). In these circumstances, there was no chance for girls to get an education, as before they had even reached adolescence, the girls were married off. Moreover, it can be assumed that polygamy gave rise to child marriages among the girls.

In addition to the marriage of underage girls, which can be linked to the misinterpretation of the Quranic text, there was also a local custom of bride kidnapping. While local customs might tolerate or even endorse bride kidnapping, there is no justification of this practice in the Quran. In 1851 in Lahich a father complained to the Tsarist authorities about his abducted daughter, Tul'Sabi, “a girl of no more than fourteen years old”. Her assailants, as father claimed, abducted, “injured and ruined” her (Collins-Breyfogle, 2011, p. 106). He demanded the abductor to be punished under the law. As we see, over the centuries, as political power dynamics shifted, the practice of bride abduction fluctuated in societal acceptance.

Other problem, honour killing practice is not justified by the Quranic text, as well. Honour killing, which are acts of violence, committed by family members usually against women who are accepted to have brought dishonour to the family, have complex historical and cultural roots, deriving from local customary. It was observed in the context of the medieval Caucasus, and persisted even during the modern period. When Khan Muhammad Kurban ogly caught his daughter and her groom in a sexual bond before their marriage, he stabbed both of them and his daughter later died (Collins-Breyfogle, 2011, p. 31). This happened because the girl's father considered their intimacy before marriage to be dishonorable to the family. Patriarchal societies often operated under strict patriarchal systems, where male family members held authority and power over female relatives. Women's behaviour was heavily scrutinized, and any perceived deviation from social norms could be seen as a threat to family honour. Local customs and unwritten laws often dictated the responses to perceived dishonour. In some cases, killing a family member who had violated societal norms was seen as a way to

restore honour. This picture took place in medieval Azerbaijan. However even in the modern period and even after the harsh Soviet policy of emancipation, in the crime chronicle of the Azerbaijan Republic one can come across news about honour killing.

As for veiling of the medieval Muslim women and their dresses, we can find female depictions in the manuscripts of the time, despite the fact that Islam prohibits human depiction. In these miniatures women, of course in headdresses, however their faces, hands and near part of legs clearly seen (Savory, 1980, p. 132). In the medieval miniatures there is no image of fully covered, only eyes seen female illustrations. European travellers also depicted Muslim women in their works, where we see noble or palace women with slightly covered head (Savory, 1980, p. 181). Olearius devotes an entire chapter to the clothing of the Safavid era nobles, including women (Brancaforte, 2003, p. 135). In the illustration he depicted a noble woman with an open face, but her head is covered by silk. It makes sense to think that full control of women body and its full covering arose much later, when patriarchal view prevailed over progressive Islamic views.

Concerning women's participation in public life, despite the limitations and restrictions, women were part of palace life and intrigues, simultaneously political activism. The studies show that women played a great role in Sufi orders (De Nicola, 2014, p. 134) in Central Asia, Iran and Anatolia. Ibn al-Athir's "Al-Kamil fit-Tarikh" contains lots of information on women in palace life and their involvement in politics. He also gave insights on public restrictions for women. In accordance to his report, boatmen were prohibited from ferrying men and women together by the order of Abbasid caliph Al-Muqtadi (Ibn al-Athir, 2002, p. 271). On the one hand, this order indicates the deterioration of the position of women in the public sphere, but on the other hand, it shows that in the eleventh century, Muslim women could leave home unaccompanied by a man and even departure somewhere by boat.

Medieval Thinkers on the Gender Issue and Impact of Their Thoughts on the Azerbaijani Society. The gender issue was considered one of the essential issues in the Muslim societies of South Caucasus and Azerbaijan in the medieval period. By that time a number of various intellectuals extensively described the role of both women and men in politics, family and society focusing on gender and family issues.

Abu Ali Hasan ibn Ali Tusi Nizam ul-Mulk, who was the vizier of the Seljuk sultans, Alp Arslan, and Malikshah, discussed the role of women in the public, social, and political life of the time in his "Siyasatnama" (Book of Government). He emphasized the restriction of ability to participate in men's labour and politics and the other rights of women who participated in state affairs and had special armies and substantial influence on their husbands, sons, kings according to Sharia under the reign of Sultan Tughril, so, this resulted discontents in the harems (Nizam ul-Mulk, 1891, p. 9). During Malikshah's reign and the vezierate of Nizam ul-Mulk, the women of harem were deprived from politics and state affairs according to excuse that Muslim rulers lacked such a custom. However, due to the efforts of these women and Nizam ul-mulk's rivals, in particular, Sultan Malikshah's wife Turkan Khatun's actions, they managed to enthrone of her son Mahmud (Nizam ul-Mulk, 1891, pp. 12–16). In addition, with the mentioning of her fearless, and strong-willed features, he discussed intelligence and merit of the women in the harem, and touched upon the general characteristics of the women of that period. In another case, evidence comes from Mahmud's dialogue with a woman whose property was stolen during his reign, and her words that demonstrate the courage of women and the fact that a woman's word, her necessary advice, would be heeded (Nizam ul-Mulk, 1891, p. 62).

In the textual source, Nizam ul-Mulk pointed, wise men always prevented women's command, capriciousness and advice, opportunity to dominate (Nizam ul-Mulk, 1891, pp. 200–202), keep women away to know about their army, treasury and country. In such a case, they will attract the people to their side, forcing one to turn to politics and another to dethrone, and will liquidate the power of the authority (Nizam ul-Mulk, 1891, p. 207). Nizam al-Mulk recounts several stories of women involvement in politics and power, and he argues that the collapse of the Sassanid Empire was due to women in the governance system. (Nizam ul-Mulk, 1891, p. 203). Overall, this source describes the strengthening of women's role as an inappropriate manifestation for them, considering the restrictions of women in politics and governance to be correct. And one can imagine how a prominent scientist negatively influenced the position of women in society.

Valuable information about Muslim women and their status in the medieval society are provided in the poetry of Nizami Ganjavi, the poet and intellectual of the twelfth century, whose works had a colossal influence on the formation of Azerbaijani identity and culture. In his first poem included in “Khamasa”, “Makhzan al-Asrar” (Treasure of Secrets) (1174 – 1175), he emphasized the rights of women and their position in society. In one of the stories of this poem, titled “Story of Sultan Sanjar with Elderly women”, Nizami Ganjavi describes courage of the widow who confronted the sultan and asserted her rights. This widow also claimed that the executioner had touched her property, reputation, and the sultan's justice, despite all this, she demanded her rights demonstrated the courage of the women of period, as well as their awareness in their rights (Ganjavi, 2019, p. 126).

One of the essential characters in Nizami Ganjavi's second poem “Khosrov and Shirin” (1180), Mahin Banu is a powerful women that receives tributes from various countries. So, Nizami describes a female authority that is not inferior from male rulers and proves the strength of women (Ganjavi, 2019, p. 90). Nizami demonstrated that women can participate in politics, administration and authority (Ganjavi, 2019, pp. 65–68) in the image of Shirin and her strength, fame, vigilance. According to the poem, Shirin succeeded Mahin Banu and was a protector of justice, supporter for the oppressed, who was able to increase the prosperity of the country, being successful in politics and administration (Ganjavi, 2019, pp. 151–153). Shirin acts as an advisor to her husband Khosrov, emphasizing importance to avoid oppression, to be kind, to support the peasants to protect his reign for a long time (Ganjavi, 2019, pp. 318–320).

Nizami Ganjavi narrated the role of women in society in his “Leyli and Majnun” (1188). Describing Leyli and Majnun getting to know each other at school, he reports that the girls of that time could get an education, and even girls and boys studied together in the same educational institution. Even though this poem represents tragic injustice for both men and women in the society. Majnun's father offered a price for Leyli, claimed everything in the world has its own price (Ganjavi, 2019, p. 61). Despite the fact that this step removes women from being a human and consider them as property, Leyli's father refuse the proposal because of his thoughts about Majnun was madly in love. And he agreed to marry her to Ibn Salam without asking Leyli's opinion (Ganjavi, 2019, pp. 87–89), despite the fact that Islamic rules require woman's consent to marriage. Composing this tragedy of loving young people, Nizami evokes sympathy and understanding from society.

In his last work, “Iskandarnamah” (1203), female characters were featured a special place. In the first part of the poem, “Sharafnama”, Alexander's behaviour towards Rovshana, daughter of Darius, elevating her in the same position as himself and sending her to govern the Rum

(Ganjavi, 2004, pp. 175, 187–190) is evidenced Nizami's utopian desires. In creating the image of the ruler Barda Nushab, again he shows these desires (Ganjavi, 2004, p. 198), demonstrating that a woman can also play a significant role in governance and management that improved with their policy. Nizami didn't support the complete covering of a woman with a niqab (veil), and in his works he depicts women with their face uncovered to a certain extent.

In general, Nizami Ganjavi portrayed women as free-spirited, brave and intelligent, and despite a number of restrictions of the time, he considered that a man should be loyal and prefer monogamy. Moreover, he represented women as rulers, indicating women's participation in politics and public life.

One of the prominent intellectuals of Nizami's time is Mahsati Ganjavi, a poetess of the twelfth century, famous for her quatrains (rubai). She was one of the first female chess players, first female poets in the East, demonstrated that woman's success in these fields. Her excellent comprehension of Arabic and Persian languages, and notion in politics indicated her knowledge and educated women of the time. Amid restrictions of women's role in public life, Mahsati Ganjavi's poetic activity has a particular significance. In Mahsati Ganjavi's works human feelings and emotions are reflected with authenticity and vitality, and the poetess defends human emotions and their spirituality and encouraged them not to hide their feelings, but to express it (Ganjavi, 1985, p. 44).

The politician, philosopher, and historian of the thirteenth century, Nasir al-Din al-Tusi, in his work "Akhlagi-Nasiri", written in 1235, provides his vision on both family issues and the role of women in the society. Tusi prefers free women to slaves and described them like kind, more inclined to fight with the enemy and avoid from bad deeds. Tusi claims that a woman is a man's servant and doesn't assert her authority. Moreover, it is necessary to prohibit her rights in politics (Tusi, 1336, p. 189). He expressed not to prevent them from things that increase her compassion, as well as to consult with the woman in household and family matters, to allow her about food and servants managements. Thus, he expressed a significant role of women in the family. One of the most crucial points in "Akhlaqi Nasiri" is that men are advised to marry only one woman, monogamy. Although he firstly, considers the kings as an exception, because they need to have many successors of the dynasty, then this concept is also applicable to rulers (Tusi, 1336, pp. 188–189). Despite permission to marry more than one woman in accordance to the Surah Al-Nisa (verse 3) in the Quran, monogamy is recommended in order to treat fairly. According to "Akhlaqi Nasiri", a man has to conceal something as a secret: the first of them is a man's feelings about love (Tusi, 1336, p. 189), so the woman does not exploit the man's devotion. The second issue is the amount of property that essential purpose of hiding this is to avoid deceptive advice given by a woman who does not understand property matters (Tusi, 1336, p. 189). In the third point, Akhlaqi Nasiri recommends keeping women away from studying and reciting Surah Yusuf (Tusi, 1336, p. 191). Tusi's purpose could be aim to prevent women's feelings for a married man. Tusi advises that if a man wants to get rid of a woman with bad characters, a man should provide her with property in order to avoid vindictive, severe disposition, and if it is not effective, he notes that it is crucial to leave and embark on a distant journey (Tusi, 1336, pp. 193–194). This statement proves that the intellectuals of the medieval period do not support violence against women, they prefer to solve issues with alternative solutions. Thus, in matters of divorce, certain rights were given to women in the thirteenth- fourteenth centuries. Providing education to girls was one of the essential issues of the time. Tusi mentions that girls should be taught housekeeping, dignified and chaste, in addition, they should be taught arts that are

considered appropriate for them. (Tusi, 1336, p. 173) This also indicated that in contrast to his some conservative attitude to women, Tusi considered certain rights for women in some issues, as well as in art and education for them.

According to the works of the medieval intellectuals, we can say that some of them contributed to the society progress in the gender issue, however, other medieval thinkers supported and facilitated women's restrictions and limitation their visibility in the public life.

Conclusions. The results of this study lead to the conclusion that some practices in the medieval Azerbaijan, as in the majority of Muslim countries, derived from the essential Islamic concept of family, such as superiority of men over women, polygamy, veiling and the others. However, the Quran emphasizes spiritual and moral equality between men and women, presenting them as complementary partners before Allah. While affirming their fundamental human dignity, the text also establishes social responsibilities when men are prescribed protective and supportive roles towards women, emphasizing mutual respect and care. Regarding the early marriage of girls, it should be noted that the Quran does not explicitly specify a precise age for marriage for girls. However, in accordance to Surah “an-Naba” (78:33), it can be assumed that marriageable age could be around 15 years. Problematically, subsequent Islamic jurisprudence (Sharia Law) relied more on hadiths – texts compiled 150–200 years after the prophet's death – rather than directly on the Quranic text. This historical development facilitated the practice of child marriages, diverging from potential Quranic guidance on age-appropriate marital unions.

Regarding veiling of women, there is no direct requirement for women to cover their heads in the Quran. It instructs women to cover their cleavage with the edges of their scarves. While this is often interpreted as a requirement for women to wear a hijab, it isn't explicitly stated as such in the guidance provided. It is widely known that in Arab tribes women covered their heads during the pre-Islamic period, primarily to protect themselves from the sun. Based on this, we can conclude that the Quran requires women to cover parts of the body that cause sexual attraction, but does not specifically mandate veiling.

Some deeply harmful practices like bride kidnapping, honour killings, and blood revenge – while often misattributed to Islamic teachings – actually stem from deeply entrenched pre-existing cultural and tribal norms that persist in certain Muslim-majority societies. These practices fundamentally contradict Islamic principles of human dignity and justice, representing localized patriarchal traditions rather than religious mandates.

Medieval philosophers and philosophical movements, especially Sufism, as well as famous scholars and poets with their worldview and outlook on life had a colossal influence on public consciousness, including family and gender roles, both positively and negatively.

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PROFILE OF ENTREPRENEURS IN THE CLASSICAL AGE OF THE OTTOMAN EMPIRE ACCORDING TO MUHIMME¹ REGISTERS (1558 – 1597)

Abstract. *The purpose of the article is to uncover the profile of entrepreneurs in the Ottoman Empire's classical age. The Ottoman Empire's entrepreneurial history is usually considered as a single period and a whole. Without taking into account the archive data, evaluations illustrate the Ottoman Empire's entrepreneurial characteristics in the after 18th century. Muhimme records are supposed to provide crucial clues concerning the Ottoman Empire's entrepreneurship prior to the 18th century. The methodological basis of the research is content analysis with MaxQDA. The muhimme registers between the years 1558 – 1597 (according to hijri² calendar: 966 – 1005) were evaluated using content*

¹ *Muhimme* records or *muhimme* registers are records in which the decisions taken by the Sultan and the Government Assembly (*Dıvan-ı Humayun*) in the Ottoman Empire are written. The word *muhimme* has the same origin as the Arabic word *muhim*, which means important. Kütükoğlu, M. S. (2020). *Mühimme Defteri*. In *TDV İslam Ansiklopedisi*: TDV İslâm Araştırmaları Merkezi.

² It is a calendar system that considers the migration of the Prophet Muhammad from Mecca to Medina (20 September 622) as the beginning and is based on the orbit of the Moon around the Earth. 1 year is 354 days and consists of 12 months. Unat, Y. (2004). *İslâm'da ve Türklerde zaman ve takvim*. In O. Ocal (Ed.), *Türk Dünyası Nevruz Ansiklopedisi* (pp. 15–24).

analysis. A total of 68 muhimme registers were examined and rated in areas of entrepreneurship, partnership, entrepreneur belief, and currency. **Conclusions.** In the study, strong conclusions are reached that Muslim Turkish entrepreneurs played an important role in the region in the mentioned period. According to the research, there are several reasons why the time between 1558 and 1578 in the muhimme registers are more intense than the period between 1579 and 1597. The Ottoman Empire and European countries (particularly Portugal and Spain) fought for political and commercial control in the Mediterranean and North African coasts from 1558 to 1578, which is perhaps the most important of these causes. According to the findings, statements that there were no or a small number of Muslim Turkish entrepreneurs in the Ottoman Empire throughout the era studied are false. On the contrary, evidence suggests that Muslim Turkish traders are engaged in brisk business in the MENA region, the Black Sea, and the Adriatic Sea. There are also indicators that the Muslim Turkish businesspeople named have a significant quantity of money. Given that the study in question merely gives a prognosis for the time period under consideration (1558 – 1597), muhimme registers are expected to offer numerous further research opportunities to academics interested in studying Ottoman entrepreneurs. Muhimme registers from the 17th and 18th centuries which were not included in the study because they were regarded outside the classical period, can be used as an example.

Key words: Entrepreneurship; Muhimme Registers; Ottoman Empire; Classical Age; Content Analysis.

ПРОФІЛЬ ПІДПРИЄМЦІВ КЛАСИЧНОЇ ЕПОХИ ОСМАНСЬКОЇ ІМПЕРІЇ ЗА РЕЄСТРАМИ МУГІММЕ (1558 – 1597)

Анотація. Метою статті є розкриття профілю підприємців класичної доби Османської імперії. Історію підприємництва Османської імперії зазвичай розглядають як єдиний період і як єдине ціле. Не беручи до уваги архівні дані, оцінки ілюструють підприємницькі характеристики Османської імперії після XXVIII ст. Уважається, що записи Мугімме надають ключові підказки щодо підприємницької діяльності Османської імперії до XXVIII ст. **Методологічною основою дослідження** є контент-аналіз за допомогою MaxQDA. Реєстри Мугімме між 1558 – 1597 рр. (згідно з календарем хіджри: 966 – 1005) були оцінені за допомогою контент-аналізу. Загалом було досліджено та оцінено 68 реєстрів Мугімме у сферах підприємництва, партнерства, віри підприємця та валюти. **Висновки.** У дослідженні зроблені переконливі висновки, що турецькі мусульманські підприємці в зазначений період відігравали у регіоні важливу роль. Згідно з дослідженням, є кілька причин, чому час між 1558 і 1578 рр. в реєстрах Мугімме є більш інтенсивним, ніж період між 1579 і 1597 рр. Османська імперія та європейські країни (зокрема, Португалія та Іспанія) боролися за політичний і комерційний контроль на узбережжі Середземного моря та Північної Африки з 1558 до 1578 р., що є, мабуть, найважливішою з цих причин. Відповідно до висновків, твердження про те, що підприємців-мусульман-турків в Османській імперії протягом всієї досліджуваної епохи не було або їх було небагато, є неправдивими. Навпаки, дані засвідчують, що турецькі мусульмани ведуть активний бізнес у регіоні MENA, Чорному та Адріатичному морях. Також є ознаки того, що названі мусульманські турецькі бізнесмени мають багато грошей. Враховуючи, що дослідження, про яке йде мова, лише дає прогноз на аналізований період (1558 – 1597), очікується, що реєстри Мугімме запропонують численні подальші дослідницькі можливості для науковців, зацікавлених у вивченні османських підприємців. Як приклад можна використати реєстри Мугімме з XXVII та XXVIII ст., які не були включені в дослідження, оскільки розглядалися поза класичним періодом.

Ключові слова: підприємництво; реєстри Мугімме; Османська імперія; Класична епоха; Аналіз вмісту.

Problem Statement. When assessing the history of entrepreneurship in Anatolia and its environs, the time before to the 20th century was practically overlooked (Kamaç, & Kışma, 2020, p. 136), and it was believed that non-Muslims dominated entrepreneurship throughout the Ottoman Empire (1299 – 1922) (Aşkın et al., 2011, p. 62). It has long been stated that Muslim prefer farming, military service, and civil service to the business (Bailey, 1942,

pp. 78–79; Çakırer, 2016, pp. 13–14; Durukan, 2006, p. 27; Geyikdagi, & Geyikdagi, 2011, pp. 376–377; Tutar, & Altınkaynak, 2014, pp. 9–10). The expansion of the 18th and 19th century period, in which foreigners and non-Muslims had a say in enterprise in the Ottoman Empire (Vlami, & Mandouvalos, 2013, p. 99), to preceding centuries without the foundation is regarded to be due to two things. One of these, it could be claimed, is that business history research is limited in comparison to other areas of business. Another factor is that researchers have yet to thoroughly analyze the Ottoman Empire archives pertaining to entrepreneurial operations in Anatolia and its environs (Akkuş, & Menteş, 2018, p. 170). While many scholarly studies have been conducted on the Ottoman Empire's trade with Europe (İnalçık, 2000a; Köse, 2005; Mantran, 1987; Şenyurt, 2013; Turan, 1968), the Ottoman Empire's internal trade and foreign trade with Egypt, Iran, and India have been overlooked. The plethora of comprehensive reports from European traders and officials is one of the reasons behind this. Another factor is that academics prefer European-language reports to those produced in other languages. With the rise of research based on Ottoman Empire sources, foreign trade and domestic trade outside of Europe began to be comprehended (Quataert, 2006, p. 943).

By analyzing the *muhimme* registries in which the Ottoman Empire's *Divan-i Humayun* (government assembly) decisions are penned, this study aims to expose the profile of a 16th century entrepreneur working in the Middle East and North Africa (MENA) region. This profile assesses the entrepreneurs' styles of entrepreneurship, partnership models, beliefs, and currencies, as well as their interpersonal ties.

The aim of this research is to find answers to the following research questions:

What are the prominent types of entrepreneurship in the classical era of the Ottoman Empire (16th century)?

Which partnership structures do entrepreneurs prefer?

How do entrepreneurs relate to the currencies used?

What kind of profile do entrepreneurs draw according to their beliefs?

Is it possible to provide evidence from the classical age to the claim that Muslim Turks did not prefer entrepreneurship in the Ottoman Empire?

By answering these research questions, it is aimed to eliminate the deficiencies in the literature evaluating entrepreneurship in the Ottoman Empire. In particular, it is aimed to bring an alternative to the evaluation of entrepreneurship in the Ottoman Empire as a single dimension. By examining the archive records of the period, it will be possible to evaluate entrepreneurship in the Ottoman Empire under different dimensions. It is thought that the archive records provide first-hand and direct information, like the *muhimme* registers, is very important in explaining the entrepreneurship of the period. By revealing the profiles of the entrepreneurs in the classical period, important contributions will be made to the history of business.

Review of Research and Publications.

Literature evaluating entrepreneurship in the Ottoman Empire. In the studies dealing with entrepreneurship in the Ottoman Empire, it is striking that the empire, which has more than 6 centuries between its establishment and abolition, is evaluated as a whole. Selected quotations as examples of this are presented below:

The most cursory study of Turkish commerce proves that the Turks as a people were not a nation of traders. That as individuals they drove shrewd bargains, no traveler in Turkey would dispute; but collectively, when compared with some of the western states, they appear most uncommercial (Bailey, 1942, p. 463).

While the Greeks, Jews and Armenians took over the trade in the Ottoman Empire, the Turks were directed to jobs such as military service, academician, bureaucracy, agriculture and animal husbandry (Durukan, 2006, p. 27).

It is striking that the period evaluated in some studies has been extended to include other periods as well:

Ottoman Empire's decentralization process started in the 17th century and peaked in the 18th century... On the other hand it was reached that necessary basic conditions (market and the profit/loss motive) did not occur for the development of an entrepreneurial class (Güven, 2016, p. 63).

In addition to all these, it is possible to see different approaches to the classical period of the Ottoman Empire from the historians who examine the archive records:

... Significant amounts of food and manufactured goods, especially textiles, were coming to Crimea from various Anatolian cities. These goods were usually brought by Anatolian Muslim traders (Faroqi, 2014, p. 360).

When the quotations, examples of which are shared above, are evaluated, it is seen that there are two different approaches to entrepreneurship in the Ottoman Empire. The first approach is a holistic view that there was no Muslim Turkish entrepreneurial class in the Ottoman Empire and that entrepreneurship was mostly done by non-Muslims and foreigners. The second approach is evaluations based on archival records. However, it can be said that the first approach is mostly encountered in studies dealing with the history of business and entrepreneurship. It would be appropriate to say that the second approach is limited (Akkuş & Menteş, 2018, p. 170).

Entrepreneurship in the 16th Century. The definition of entrepreneurship has evolved over time, moving through various stages to arrive at its current meaning. While Richard Cantillon (2010, pp. 29–30) described entrepreneurship as a person who seeks out possibilities and takes risks in order to generate money, Joseph A. Schumpeter (2000) interpreted this within the context of innovation and coined the term “destructive entrepreneurship”. When the term “entrepreneurship” is used in the twentieth and twenty-first century, concepts similar to Schumpeter's are understood (Hagedoorn, 1996, pp. 883–886). However, it is believed that the definition of innovation-based entrepreneurship represents today's perspective and will not adequately encompass the 15th and 17th centuries, which predate the industrial revolution. In this context, it is thought that evaluating from Cantillon's standpoint, which is thought to better reflect the period's entrepreneurship concept, will yield a better outcome (Döm Tomak, 2015, p. 3). In addition, the terms Entrepreneur and bourgeois are often used interchangeably in the economic sciences (Özer, 2001, p. 166). With this popular perception, the entrepreneur is usually regarded as well-to-do and a member of the top class. Those Cantillon (2010, p. 31) who buy/produce things from the provinces, on the other hand, are mentioned as entrepreneurs and traders who bring them to the town's market once or twice a week and sell them. As a result, it is incorrect to describe an entrepreneur as a person who only belongs to a specific social class. Large entrepreneurs were in the minority in 18th century England, with the exception of a few cloth merchants and dealers interested in overseas commerce. It is also reported that in the 18th century, the largest firms in Amsterdam employed no more than 30 workers (Braudel, 2017, p. 431). Based on this, entrepreneurship between the 15th and 17th centuries can be defined as modest economic entities that try to make a profit by taking a risk, and whose operations are primarily carried out by family members, engaged in crafts or local or foreign trade.

Entrepreneurial Structure in the Ottoman Empire During the Classical Age. Trade, one of the characteristics of entrepreneurship, is evident throughout the Ottoman Empire and the Islamic States it inherited (İnalçık, 2000b). In fiqh books, commercial rules, prohibitions, restrictions, and legal implications are all detailed. The presence of debtors and travelers in the consumption of zakat-eligible commodities improves the entrepreneurs' bravery (Kallek, 2012). The merchant would be supported and protected, and this trade would provide prosperity and cheapness to the country, according to the advice given to the Ottoman Emperor in the second half of the 15th century (Braudel, 2017, p. 556).

It is clear that traders were an essential part of the Ottoman Empire's local economy. Furthermore, their actions can raise the price of raw materials and have a negative impact on the activities of local traders. Controlling the merchants is another responsibility that the central authority values just as much as safeguarding them. It is thought that whereas the Ottoman authority had little trouble regulating artisans, merchants were more difficult to regulate (Pamuk, 2005, pp. 8–9).

When it comes to overseas trade, the Ottoman Empire's merchants are known to have dealt directly with European governments. Even the participation of Turkish and Iranian merchants at Italian fairs reached a level that threatened Venice's trade (İnalçık, 2014, p. 274). The concessions between the Ottoman Empire and Venice are the cause of this. The concessions that were initially unilateral and in Venice's favor were later negotiated as joint concessions. The stipulations indicate that Ottoman merchants should not be prohibited from using the free trade advantages provided to Venetians in any way and that no customs duty should be paid on goods sent for sale (Uzunçarşılı, 2011, p. 684). As a result, Turkish tradesmen were allowed to trade throughout the region, from the Aegean islands to Venice. The merchants that are traveling to Venice can be classified into two categories: The first group is the private traders (*hassa tacir*), who are sent to deliver the orders of the palace members (Bozpinar, 2021, p. 352). The second group consists of other traders who band together to avoid piracy and high freight expenses. Both the sea and land routes from Istanbul to Spalata (Split) port, as well as the Adriatic railway, are employed in these commerce (Köse, 2005, p. 106). When Turkish merchants stayed in Venice for longer periods of time, they began to establish companies throughout the city. As a result, the Fondaco Dei Turchi (Fondoko of Turks) was established in Venice as a business inn (trading center) where Turkish merchants could collaborate (Turan, 1968, pp. 249–261). Another intensive maritime trade took place on the Black Sea coast. Turkish and Muslim merchants carried out their trade with Eastern Europe through ports on the Black Sea. The Ottoman Empire built castles to control these ports and went to war when necessary (Turanly, 2019, pp. 49–52).

The Ottoman Empire's tradesmen and artisans were controlled and managed by guilds (*lonca*) during its classical age. Aside from keeping track of the organization's and tradesmen's general position, the guild serves as a link between the state and the tradesmen (Uzunçarşılı, 2011, p. 689). In Istanbul, there were between 126,000 and 260,000 artisans organized into 1109 guilds, according to reports. Except for vocations that are prohibited by sharia, such as pub management, no guilds comprised wholly of Muslims or totally of non-Muslims have been discovered. The leaders of mixed guilds, on the other hand, are primarily Muslims (Faroqhi, 2006, pp. 713–714).

In the Ottoman Empire's Anatolia region, there was a thriving weaving industry during the classical period. Textile manufacturing was in a position to compete with Europe. Even Europe's high-end clothes are coloured in Bursa dyehouses. During the reign of Murat III

(1574 – 1595) it is known that weaving and dyeing techniques was exported to England (Tabakoğlu, 2008, p. 250). The leather industry was reported to be ahead of Europe. Processed and dyed leather was one of the principal exports (Akdağ, 1949, p. 509).

Materials and Methods. The study relied on *muhimme* registers, which were used to record the decisions made at *Divan-i Humayun* sessions throughout the *Ottoman Empire's* classical age. After the sultan's assent, the decisions made in the *Divan-i Humayun* are recorded in the *muhimme* registers (Kütükoğlu, 2020). There are 419 *muhimme* registers in the Presidency of the State Archives of the Republic of Turkey that include records from 961 – 1333 AH to 1553 – 1915 Gregorian calendar. These registers contain state-related political, economic, cultural, social, and military choices. (Başbakanlık Osmanlı Arşivi Rehberi, 2010, p. 7).

Two distinct sources provided transcribed versions of the *muhimme* registers from the Ottoman Empire's classical age (1300 – 1600). The Presidency of the State Archives of the Republic of Turkey published ten of the *muhimme* registers discussed in the study, which were transcribed from the Arabic alphabet to the Latin alphabet. Within the purpose of the master's thesis, 65 *muhimme* registers from the classical age were transcribed into the Latin script. Because 3 of the 75 *muhimme* transcripts were from the same *muhimme* register, they were eliminated from the study.

The content analysis approach and the MaxQDA tool were used to examine the *muhimme* registers. The texts that are the subject of the research are handled through several components in content analysis, and a solution to the research question is sought. These components are listed as uniting, sampling, coding, reducing, inferring and narrating. The first two stages of the specified components are considering and assessing *Muhimme* registers as a whole, sorting them according to their dates, and deleting duplicates. Later in the study, the remaining four components are implemented in stages (Krippendorff, 2004, pp. 82–83).

Content analysis, descriptive, inferential, psychometric, and predictive methodologies are all widely accepted (Neuendorf, 2002, p. 53). As a result, this study is thought to be closer to descriptive content analysis.

Coding was done in *muhimme* registers to reveal entrepreneurship in the Ottoman Empire's classical period, which established the research subject. In these codings, the attribute coding approach, which is typically classed under grammatical methods, was used (Saldaña, 2016, p. 83). While these codings were being created, text search engines were used to find the word sequences defining the code in the text, and the provisions of the *muhimme* clauses were assigned to the applicable code as a paragraph (Woolf & Silver, 2018, pp. 83–84). As a result of the automatic coding, multiple codings for the same paragraph were created, necessitating the employment of the simultaneous coding approach (Saldaña, 2016, p. 94).

Results. As a consequence of the *muhimme* register coding addressed in the study, it has been discovered that some *muhimme* registers documents lack a code under the entrepreneurship upper code, which forms the basis of the research topic. The *Muhimme* Registers numbered 2, 8, 11, and 50, which do not contain any of the codes under entrepreneurship, were eliminated from the study in order to display the results of the content analysis in a healthy way. As a result, 68 *Muhimme* register were included in the analysis. Table 1 shows the encodings used in the documents as well as the frequency of these encodings.

Under the entrepreneurship upper code, traders are coded more clearly than other types of entrepreneurship, as shown in Table 1. There is a very apparent coding frequency difference between the merchant ship (*mudaraba* contracts) and other partnership models under the entrepreneurship model higher code. The majority of the views of entrepreneurs remain unnoticed and tagged as unknown in the coding on their beliefs. When unknowns are removed, Muslim entrepreneurs are found to be more coded than non-Muslim entrepreneurs. When it comes to currencies or sorts, the *akce* (silver coin) appears more frequently in the text than the others.

Table 1

Code Frequencies		
Upper Code	Sub Code	Code Frequency
Entrepreneurship	Merchant	649
	Middleman	53
	Artisan	34
	Loom	5
	Coffee Maker	5
	Fruit Seller	2
Partnership Model	Trade Ship (<i>Mudaraba</i> Contracts)	267
	Classic Partnership (<i>Mufavada</i> Contracts)	28
	<i>Murabaha</i> Contracts	8
Religion	Muslim	163
	Non-Muslim	99
	Unknown	471
Money	<i>Flori</i> (Gold Ducat)	506
	<i>Kurus</i> (Piastre)	267
	<i>Akce</i> (Silver Coin)	8458
	<i>Altin Sikke</i> (Gold Coin)	921

Table 2

Code Frequencies According to Date Ranges					
Upper Code	Sub Code	Hijri Dates Range (Gregorian)			
		966 – 976 (1558 – 69)	977 – 986 (1570 – 78)	987 – 995 (1579 – 88)	996 – 1005 (1589 – 97)
Entrepreneurship	Merchant	234	226	76	113
	Middleman	28	18	4	3
	Artisan	9	12	3	10
	Loom	4	1	0	0
	Coffee Maker	3	0	0	2
	Fruit Seller	2	0	0	0
Partnership Model	Trade Ship (<i>Mudaraba</i> Contracts)	84	123	18	42
	Classic Partnership (<i>Mufavada</i> Contracts)	8	3	16	1
	<i>Murabaha</i> Contracts	4	4	0	0
Religion	Muslim	67	57	22	17
	Non-Muslim	42	32	15	10
	Unknown	163	162	49	97
Money	<i>Flori</i> (Gold Ducat)	140	215	81	70
	<i>Kurus</i> (Piastre)	22	54	75	116
	<i>Akce</i> (Silver Coin)	1561	2600	2721	1576
	<i>Altin Sikke</i> (Gold Coin)	322	320	155	124

The *Muhimme* Registers are organized into clusters based on the dates on which they were written. Table 2 shows the code frequencies of *muhimme* registers clustered according to similar year intervals in Hijri. For practically all codes, the coding on *muhimme* rules is concentrated in the periods 966 – 976 and 977 – 986 Hijri, as seen in the table. In the third (987 – 995) and second (977 – 986) eras, the codes for the classical partnership (*Mufavada Contracts*) are prevalent, whereas the *akce* (silver coin) codes are dominant in the second (977 – 986) and third (987 – 995) periods.

Table 3

Code Relationships								
Upper Code	Sub Code	Religion			Money			
		Muslim	Non-Muslim	Unknown	<i>Flori</i> (Gold Ducat)	<i>Kurus</i> (Piastre)	<i>Akce</i> (Silver Coin)	<i>Altın Sikke</i> (Gold Coin)
Entrepreneurship	Merchant	163	101	430	26	9	149	47
	Middleman	7	0	47	0	0	17	1
	Artsan	9	0	22	1	0	9	3
	Loom	0	3	2	0	0	1	1
	Coffee Maker	1	0	4	0	0	0	0
	Fruit Seller	3	0	0	0	0	0	0
Partnership Model	Trade Ship (Mudaraba Contracts)	13	14	58	6	1	44	4
	Classic Partnership (<i>Mufavada</i> Contracts)	1	1	0	0	1	6	0
	<i>Murabaha</i> Contracts	0	0	0	1	0	4	2

The code relations scanner was used to see the possible relationships between the sections coded in the studied *muhimme* registers, and the information in Table 3 was retrieved. When considering the relationships between entrepreneurship and belief, it becomes clear that belief cannot be predicted in practically all types of entrepreneurship. However, it is discovered that Muslims are more coded in all sorts of entrepreneurship, with the exception of those who create fabric, when evaluating individuals whose faith is determined. When considering the partnership models in terms of beliefs, it is clear that Muslims and non-Muslims are nearly equal. When evaluating entrepreneurs in terms of money, it is clear that the *akce* (silver coin) has a strong link to all sorts of entrepreneurship. Similarly, the *akce* (silver coin)'s advantage in partnership models is apparent.

Figure 1 depicts the code co-occurrence model, which shows the links between the conflicting codes. Because the relationships are weak, the *murabaha* contracts code, which is included under the partnership models higher code, is not included in this model. When entrepreneurs whose faith cannot be ascertained are eliminated from this model, it can be concluded that the Muslim code is connected with a greater number of entrepreneurship

“Ships, merchants, and other temporary ships in Basra were chartered and sent as per your command to deploy the military, which was transferred from Baghdad to Lahsa by sending a letter. – Muhimme No 3 Rule No 260 (3 Numaralı Muhimme Defteri (966 – 968 / 1558 – 1560), 1993).

The governor of Egypt ruled that; ... not to harm the merchants and other seashores in the sea.... – Muhimme No 3 Rule No. 781 (3 Numaralı Muhimme Defteri (966 – 968 / 1558 – 1560), 1993).

The merchant ships in the Persian Gulf were chartered to assure the deployment of soldiers in the first *muhimme* rule above, but the number of ships arriving from the Indian Ocean and the Arabian Sea was restricted due to traffic congestion on the Basra route. The provision stated that grain-carrying ships should not be hampered throughout the dispatch procedure. The second article mandates the protection of the coasts of Rhodes and North Africa, as well as the ships that trade there. These provisions set a precedent for the Ottoman Empire’s efforts to ease and safeguard entrepreneur trade in the MENA region, both by land and by sea.

The following are some weighted provisions pertaining to Muslim entrepreneurs:

When Elvanzade Mustafa, the head of Zekiye, sent a letter and the men of the Hodja Huseyin Elvan, one of the Mosul merchants, took the ship with eight thousand gold ducats they sent to the scholars of Baghdad and came to the city... – Muhimme No 21 Rule No 379 (Çelik, 1997).

Hacı Bali, a Darendé resident, came forward and stated that when he was a trader and living in Adilhan, which was affected by the Gallipoli disaster, his money was stolen with a basket and chest containing one hundred thousand silver coins owing to the night. – Muhimme No. 7/1 Rule No. 58 (7 Numaralı Muhimme Defteri (975 – 976 / 1567 – 1569) Özet-Transkripsiyon- indeks I, 1998)

...The merchant known as Kara Mustafa came to my capital with some traders; “While going to Venice for trade during the last peacetime and returning with goods, the non-Muslims named Uskok gathered in the city of Sin, raided the ships, plundered their sustenance and captured their men. – Muhimme No 7/3 Rule No 2729 (7 Numaralı Muhimme Defteri (975 – 976 / 1567 – 1569) Özet-Transkripsiyon- indeks III, 1999)

It is obvious that the businesspeople mentioned in the preceding quotations had Muslim names. Furthermore, the absence of a son (*bin*) or father (*ibn*) decorations comparable to Arabic names in their names, as well as the use of Turkish nicknames, show that the business people are Muslim Turks. These Muslim Turkish merchants have substantial capital, as evidenced by the eight thousand *flori* (gold ducats) and one hundred thousand *akce* (silver coin) indicated in the first two stipulations. Muslim Turkish entrepreneurs trade with ships and potentially with a *mudaraba* contract, according to the first and third provisions. It is assumed that the merchant named Kara Mustafa described in the third provision traveled by sea to Frangistan, i.e., Venice, and returned to purchase goods. It can be assumed from this that the entrepreneurs in the cited provisions trade with significant capitals via land or sea.

It is believed that merchants specially chosen by the Ottoman Empire were included in certain of the terms of the *muhimme*, which were coded as Muslims. These traders are mentioned in the texts by using the term “private trader” (*hassa tacir*) to refer to them.

Mustafa, a Sipahi kid and a private trader, was said to be on his way from Moscow to buy tin, iron, and cloth for the state when his ship was wrecked in the Ahyolu battle, and the items within were lost. Now, I commanded;... –Muhimme No 3 Rule No 623 (3 Numaralı Muhimme Defteri (966 – 968 / 1558 – 1560), 1993).

The passages above plainly illustrate that the state appoints private traders. It should be noted, however, that these merchants should not be regarded as civil servants, and that they have legitimate jobs outside of private trade. Furthermore, it is clear from the third provision's inheritance expectations that private traders have substantial holdings.

During the coding of the forms of entrepreneurship according to their beliefs, entrepreneurs who were clearly acknowledged to be non-Muslims were coded with the non-Muslim code.

To the people of Venice; When one of the traders of Istanbul, Yasef, the son of Salamon, and other Jews named Yakob, the son of Salamon, gave a letter to our government, and sent a merchant named Tan Antonyonoski Tel, Lorilçoski Tel, and Loriço Kirardo, one of the Venetian merchants, and Kirardi, the son of Antoni, one of their relatives, to Istanbul for trade with his own ship...Muhimme No 27/1 Rule No 310 (Döşemetaş, 2014)

The merchant is plainly identified as a non-Muslim in the first quotation. It is possible to deduce from the complaint's text that the merchant was an Ottoman Empire citizen. Two groups of merchants from Istanbul and Venice had a conflict, according to the second excerpt. The merchants from Istanbul were clearly Ottoman Empire residents who were also Jewish. In the third provision, it is said that in the Peloponnese city of Balyabadra, there was a dispute between British merchants and Muslim Turkish merchants.

Discussion and Conclusion. According to the *muhimme* registries reviewed, entrepreneurship was highly valued by the Ottoman Empire administration during the classical age. As cities such as Istanbul, Gallipoli, Antakya, Antep, Diyarbakir, Damascus, Aleppo, Baghdad, Mosul, Tripolitania, and Egypt, which are explicitly specified in the provisions, demonstrate, entrepreneurship activities are quite active in the MENA region. Furthermore, the clauses of the *muhimme* registers show that Muslim Turks dominate trade in the MENA region. It is clear that Muslim Turks who are Ottoman Empire citizens, as well as foreigners and non-Muslims, are involved in trade with countries like England and Venice. Another example of this predicament is a business inn in Venice dedicated to Muslim Turkish traders (Turan, 1968, pp. 249–261). Similarly, Muslim Turks, particularly individual traders, are thought to have influenced commercial activities along the Black Sea beaches. It states, for example, İnalçık (2014, p. 273) that Muslims make up 82 percent of the merchants that visit Crimea's ports. It is also stated that the Ottoman Empire built castles in ports such as Kafa, Taman and Akkerman to strengthen trade in the region and facilitate its merchants' trade with Eastern Europe (Turanly, 2020, pp. 39–40).

Entrepreneurs formed partnerships with *mudaraba* agreements, which are usually preferred in ship trading, according to *muhimme* registers. The reason for this is said to be that the provisions on entrepreneurs in the books largely apply to those with a lot of money. *Divan-i Humayun* usually targets relatively large businesspeople who deal mostly by sea under the *mudaraba* agreement. Micro and small-scale entrepreneurs, such as tradesmen and craftsmen, are rarely subject to the provisions of the *muhimme* laws, and even when they are, they are treated as a community. The cause of this scenario is assumed to be that micro and small businesses prefer to address their legal issues to local courts rather than the *Divan-i Humayun*. Individual legal applications are most commonly seen in local courts, however when the matter affects a larger group, it may be brought before the *Divan-i Humayun* (Çeken, 2020, pp. 330–332).

It is thought that *akce* (silver coin), *altın sikke* (gold coin) and *kurus* (piastre), which are among the basic currencies of the Ottoman Empire, are frequently mentioned in the *Muhimme Registers*. Furthermore, it is thought that the *flori* (gold duka), Venice's currency, was widely used in the Ottoman Empire.

According to the research, there are several reasons why the time between 1558 and 1578 in the *muhimme* registers are more intense than the period between 1579 and 1597. The Ottoman Empire and European countries (particularly Portugal and Spain) fought for political and commercial control in the Mediterranean and North African coasts from 1558 to 1578, which is perhaps the most important of these causes (Ceran, 1996, pp. 271–388).

According to the findings, statements that there were no or a small number of Muslim Turkish entrepreneurs in the Ottoman Empire throughout the era studied are false. On the contrary, evidence suggests that Muslim Turkish traders are engaged in brisk business in the MENA region, the Black Sea, and the Adriatic Sea. There are also indicators that the Muslim Turkish businesspeople named have a significant quantity of money.

Given that the study in question merely gives a prognosis for the time period under consideration (1558 – 1597), *muhimme* registers are expected to offer numerous further research opportunities to academics interested in studying Ottoman entrepreneurs. *Muhimme* registers from the 17th and 18th centuries which were not included in the study because they were regarded outside the classical period, can be used as an example.

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**FORMATION OF THE ROMANIAN DIASPORA IN KAZAKHSTAN
AS A RESULT OF THE RESETTLEMENT POLICY OF THE RUSSIAN EMPIRE
AND THE SOVIET TOTALITARIAN REGIME**

Abstract. In the XIXth and XXth centuries, the formation of the Romanian diaspora took place on the territory of Kazakhstan. It is an example of successful adaptation of a certain ethnic group

representatives in a foreign cultural environment. **The purpose** of the research is to study the peculiarities of the process of adaptation of the Romanians in Kazakhstan in the pre-revolutionary era, in the early years of the Soviet power, during the period of deportation during and after World War II. **The objective** was to study the climatic, economic, domestic, socio-cultural adaptation of the Romanians in Kazakhstan during the above-mentioned periods of history. The principles of historicism, scientific objectivity, systematicity and comprehensiveness are the theoretical and methodological foundations of the research. In the study there have been used general scientific (analysis, synthesis, generalization) and special historical methods (comparative historical and bibliometric). **The scientific novelty** consists in the study of the process of adaptation of the Romanians in Kazakhstan after forced resettlement. The process of adaptation includes the construction of housing adapted to the natural and climatic conditions of Kazakhstan. **Conclusions.** The Romanian settlers became the founders of settlements in the Steppe region. Their participation in the economic life of Kazakhstan has been analyzed. One of the subjects of the study is the relationship between the settlers and the Kazakh population. Despite the prevailing historical circumstances, the Romanians were able to adapt to local conditions and make a definite contribution to the socio-economic development of the region. It should be stated that the Romanian diaspora of Kazakhstan, having taken root, has shown an example of successful adaptation of an ethnic group in a foreign cultural environment.

Key words: Kazakhstan, Romanians, adaptation, migration, deportation, ethnos, diaspora.

ФОРМУВАННЯ РУМУНСЬКОЇ ДІАСПОРИ В КАЗАХСТАНІ В РЕЗУЛЬТАТІ ПЕРЕСЕЛЕНСЬКОЇ ПОЛІТИКИ РОСІЙСЬКОЇ ІМПЕРІЇ І РАДЯНСЬКОГО ТОТАЛІТАРНОГО РЕЖИМУ

Анотація. У XIX і XX ст.ст. на території Казахстану відбувалося формування румунської діаспори. Це приклад успішної адаптації представників певної етнічної групи в інокультурному середовищі. **Мета роботи** – вивчення особливостей процесу адаптації румунів в Казахстані в дореволюційну епоху, в перші роки Радянської влади, в період депортації під час і після Другої світової війни. Завдання полягало у вивченні кліматичної, економічної, побутової, соціокультурної адаптації румунів у Казахстані у названі періоди історії. **Теоретико-методологічними засадами** дослідження є принципи історизму, наукової об'єктивності, систематичності і всебічності. У статті використовувалися загальнонаукові (аналіз, синтез, узагальнення) і спеціальні історичні методи (порівняльно-історичний і бібліометричний). **Наукова новизна** полягає у вивченні процесу адаптації румунів у Казахстані після вимушеного переселення, що, зокрема, включає будівництво житла, адаптованого до природно-кліматичних умов Казахстану. **Висновки.** Румунські переселенці стали засновниками поселень у Степовому регіоні. Відзначається їхня участь в економічному житті Казахстану. Одним із предметів студіювання були взаємини між переселенцями і казахським населенням. Незважаючи на історичні обставини, що склалися, румуни змогли адаптуватися до місцевих умов і внести певний вклад у соціально-економічний розвиток регіону. Можна констатувати, що румунська діаспора Казахстану, прижившись, показала приклад успішної адаптації етнічної групи в інокультурному середовищі.

Ключові слова: Казахстан, румуни, адаптація, міграція, депортація, етнос, діаспора.

Problem Statement. The historical events of the late twentieth century, which put an end to the existence of the Soviet political system, revealed the need to rethink many events in the history of individual nations. The collapse of the USSR led to the emergence of new studies, which were characterized by an objective nature. Under the new conditions, historians were faced with the task of not only identifying little-studied historical events, but also objectively studying them and truthfully evaluating them. One of these problems is the adaptation of ethnic groups within certain territorial boundaries. These ethnic groups include the Romanians, some of whom ended up in the teries, who find themselves here not of ritory of Bessarabia occupied by the Soviet Union. The totalitarian communist regime

on the territory of the former USSR set a course for the elimination of eastern Romanians as an ethnic group, not only transferring them to the “Cyrillic” alphabet, but also changing the name of the people to “Moldovans”, and the occupied territory to the Moldavian SSR. The gaining of independence of the post-Soviet republics led to the revival of national self-awareness and ideological identity. And this led to a rethinking of many historical events of the past. After the collapse of the socialist bloc, the Romanian people had hope for the reunification and revival of the unity of the nation, whose representatives also live on the territory of Kazakhstan.

The object of the study is the Romanian diaspora in Kazakhstan.

The subject of the study is the adaptation of immigrants and deported Romanians in Kazakhstan in different historical periods.

The purpose of the study is to study the process of adaptation of the Romanian population to new geographical, socio-economic, political conditions, as well as to study the characteristics of relationships with the indigenous population.

The Kazakhs, who experienced all the hardships of the colonial regime, treated the peoples who moved there with their characteristic kindness and traditional hospitality. And they found a new homeland on the Kazakh soil, preserving their identity.

No less important is the problem of forming citizenship, Kazakhstani patriotism, which is based on the unity of all ethnic groups of Kazakhstan.

The Romanians are an example of successful adaptation of ethnic groups in a foreign cultural environment. Finding themselves, for the most part, against their will and under the name Moldovans on the territory of Kazakhstan, they were able to become part of a multinational society and contribute to the development of the Republic of Kazakhstan.

A number of scientific research methods have been used in the preparation of this publication. The historical method is among them, which is based on the study of written sources characterizing the events of the forced deportation of the Romanians to Kazakhstan.

The analogy method allowed us to determine similarities in some aspects, relationships and properties between non-identical objects of study. The process of forming relations between the Romanians and other ethnic groups who ended up in Kazakhstan as a result of forced deportation is of great importance. The bibliometric method made it possible, based on quantitative data, to conduct a comparative analysis of the deportation of the Romanian population, to consider resettlement policy and forced deportation in dynamics, as well as the interaction and interdependence of political events during the period under study.

The use of comparative historical and comparative methods contributes to the reconstruction of the main stages of the process of ethnic resettlement and deportation of the Romanians to Kazakhstan and Central Asia.

Review of Sources and Recent Research. When researching this topic, the basis was the available literature and archival documents, which made it possible to identify the chronology, features of the processes of resettlement and deportation of the Romanians to the territory of Kazakhstan and Central Asia, and their adaptation in a foreign ethnic environment. Archival and statistical materials are also of great importance, which provided information on the quantitative and qualitative composition of the Romanians.

This issue is reflected in the studies by Moldovan and Russian researchers: N. F. Bugai (Bugai, 1989, pp. 135–144), V. N. Zemskov (Zemskov, 1991, pp. 151–165), V. P. Zinoviev (Zinoviev, 2019, pp. 36–48), V. I. Tsaranov (Tsaranov, 1998, pp. 71–73), A. A. Shtyrbul (Shtyrbul, 2021, pp. 3–12).

The three-volume publication “History of Moldova” focuses on the topic of deportation of the Romanians during the Great Patriotic War and the post-war period (Istoria Moldovei, 2016, p. 472).

The problem of interethnic relations between settlers and the indigenous population was also reflected in the works of Kazakh historians M.K. Koigeldiev (Koigeldiev, 2009, p. 448), Zh.U. Kydyralina (Kydyralina, 2009, p. 304), Kaziev (Kaziev, 2016, p. 121).

The studies by K. S. Aldazhumanov and E. K. Aldazhumanov (Aldazhumanov, & Aldazhumanov, 1997), M. K. Kozybaev (Kozybaev, 1998), A. N. Alekseenko (Alekseenko, 1993) analyze the repressions of the 20–40s of the twentieth century. The authors mentioned, among other things, the process of deportation of the Romanian population.

The purpose of the research is to study the resettlement process and the features of the economic, social and cultural adaptation of the Romanians in Kazakhstan.

Results of the Research.

The formation of the Romanian diaspora in Kazakhstan began in the late 19th and early 20th centuries.

One of the difficult problems in historical science is the issue of national policy. These include the forced resettlement of a number of peoples of the Soviet Union during the Stalin era. Despite the extensive historiographical base of this issue, there are some circumstances regarding the study of individual peoples. The process and circumstances of the deportation of the Germans, the Poles, the Koreans, the Kalmyks, and peoples of the Caucasus, who found themselves unwillingly on the territory of Kazakhstan, have been sufficiently and deeply studied. To a lesser extent, the history of the deportation of the Romanians, who were forcibly called the Moldovans, was reflected in domestic and foreign historiography (Cherepnin, 1965, p. 448).

This study attempts to study the process of resettlement and deportation of the Romanian population to Kazakhstan in historical retrospect.

The abolition of serfdom and agrarian resettlement reforms led to an influx of the Romanians from the territory of Bessarabia and Ukraine to the eastern outskirts of the Russian Empire, including Kazakhstan. The superior number of peasants, the lack of an adequate amount of free land resources, and the miserable situation of the population led to the resettlement of some Romanians to the east (Cherepnin, 1965, p. 575).

The boom in the mass migration of peasants to Siberia and Kazakhstan occurred during the period of the agrarian reform of P.A. Stolypin. In 1907 – 1914, the first villages of Romanian settlers began to form in these regions. In 1896 – 1914, 34,140 people moved from Bessarabia to the eastern outskirts of the Russian Empire (Istoria Moldovei, 2016, pp. 472).

In 1913, 202 residents of the Bessarabian province of Akkerman Uyezd petitioned the government to allocate land plots on the Romanov lands located in Turkestan (Central State Archive of the Republic of Kazakhstan – CSARK, f. 391, d. 5, c. 1107, pp. 35–39).

Thus, immigrants from Bessarabia arrived in the Akmola region in 1871 – 1907: 691 men, 567 women. In Semipalatinsk region in 1905 – 1907 there were 193 men and 181 women, respectively. Thus, a total of 1,632 Romanians settled in these two regions (Troinitsky, 1905, pp. 2–91).

Archival materials reflecting the first migrations of Romanian peasants and the reasons for their migration can be traced in the documents of the National Archive of Moldova. The first movements of the Romanians date back to the 40s of the 19th century, which was caused by oppression from the landowners. In the 40–60s of the same century, the place of resettlement of immigrants from

Bessarabia was the Black Sea region and the Caucasus, but in the 80–90s the situation changed. The flow of immigrants was sent to Siberia, Central Asia and the Far East. In Kazakhstan, the places of settlement of the Romanian population were Akmola, Orenburg, Semipalatinsk and Semirechensk regions (National Archive of Moldova (NAM), f. 2, d. 1, c. 3330).

According to census information in 1897, 295 people who moved from the territory of Bessarabia lived on the territory of Kazakhstan and nearby lands (Dyadichenko, & Chermak, 1906, p. 27).

The bulk were the Romanians, who chose Semirechye and the Steppe Region to live. In fact, about 60 thousand people from Bessarabia went to the east of the Russian Empire. The resettlement was massive. However, not everyone was able to adapt to the new conditions. This was due to both natural circumstances and social problems. The result was the return of forty percent of the Romanians to their native places (Shtyrbul, 2021, pp. 3–12).

The Romanians who remained in Kazakhstan managed to settle down so well that they established several settlements where the Moldovan population predominated. These include 22 villages founded in Akmola, Aktobe, Semirechensk regions.

Sources confirming this list, as well as some historical details of the founding of these villages, are given below in the text. The dates of formation of some villages may differ from other sources by 1–2 years due to the fact that in some cases the date is considered to be the allocation of a plot for the village and the appearance of the first inhabitants there, while in others it is the official recording of the date in administrative documents. In addition, there were small groups of the Romanian settlers in a number of villages in which a different ethnic composition predominated: the Ukrainians, the Russians, the Bulgarians and the others. The Romanian villages of Kutuzovka (1908) and Larga (1909), which arose in the Borisov volost of Omsk district of Akmola (Omsk) region (now Sherbakul district, Omsk region), are located approximately 100 and 120 km southwest of Omsk, in a picturesque flat forest-steppe zone, almost on the border of the birch forest-steppe with the steppe proper. The main place of resettlement from Bessarabia for Kutuzovites was the village of Cherlena Mare (Cherlenovka) in Khotyn district of Bessarabia province (now in Novoselitsky district of Chernivtsi region of Ukraine) (Kolesnikov, 1993, p. 60)

History has preserved the names of the walkers who arrived in 1908 “for reconnaissance”: Alangulit (Alangulai), Bezhenar, Kondra (Kondrya), Lungu (Lungan), Onisko (Dyadichenko, & Chermak, 1906, p. 27).

Based on the amount of land allocated, it was planned to accommodate 305 men in Kutuzovka, 252 in Larga. Five years later, according to Omsk diocese, 370 men and 360 women lived in Kutuzovka (Kolesnikov, 1993, p. 60).

Immediately upon arrival at the settlement site, the allotted land was distributed by lot: the headman took the caps of the settlers out of the bag and threw them onto a cut-out plot, and places for homesteads were distributed in the same way (exhausted by the scarcity of land and overcrowding in their homeland, the Kutuzovites planned quite large areas for homesteads and, in addition, wide streets). Grigory Lungan was elected the first headman of Kutuzovka, and then, from 1913 to 1918, this troublesome position was occupied by Panteley Shtyrbul (Goloshubin, 1914, p. 55).

The inhabitants who formed Larga in 1909 came from the village of Morishneu (Morishneu) in the Bessarabian province. There were slightly fewer displaced people there than in Kutuzovka. The first families to arrive at the designated Kashimkul resettlement area were Bulesu, Vitan, Dulyak, Skrindets and the others (Evseev, 2009, p. 13).

The Romanian settlers were initially extremely poor. It was noted that the income from the trading store in Kutuzovka was minimal, since residents, lacking funds, rarely visit it (Nazartseva, 2000, p. 186).

In the surrounding Kutuzovka and Larga, Russian and Ukrainian rural Romanian settlers were received kindly. They noted approvingly: “They don’t talk like us, but they pray and cross themselves the same way as we do”. There the settlers were delighted by the open spaces and high-quality, although not very deep, black soil, but were alarmed by the sharply continental climate (winters are cold, and the relatively hot summer lasts exactly three months, rains fall unevenly, and drought occurs every few years). There are no rivers, including tributaries of the Irtysh, in these places, and the Irtysh itself is located quite far away (about 120 km to the east). Small lakes, artificial pits and wells in these places are fresh, but more often with an admixture of salt: from light to quite noticeable. Almost simultaneously, in Omsk district, approximately 140 km south of Omsk, but at a noticeable distance from Kutuzovka and Larga, the village of Bessarabka appeared in 1909. Its first settlement families are known: Ursul, Sivoplias, Burlak, Vshivenko, Tkach, Dolgovy (Kolesnikov, 1993, p. 60).

It is interesting that the Romanians in Kazakhstan influenced the fairly wide spread of gardening among other residents of the area: the settlers brought seedlings with them and tried to grow everything they could here, even grapes, but in the new conditions the grapes did not take root, but with proper care, apples, pears, plums, cherries.

According to the results of the 1897 census, 75 Romanians lived in Akmola region: 44 males and 31 females (Troinitsky, 1905, pp. 2–91).

In his telegram to the Committee on Land Management, the Governor of Bessarabia Haruzin, asked for benefits for the resettlement of Romanian peasants from Bessarabia to the territory of Kazakhstan (Russian State Historical Archive (RSHA), f. 391, d. 3, c. 946, p. 536).

In 1908, the Governor of Bessarabia put before the Committee on Land Management the issue of providing special state assistance to 140 families of tithe farmers in Akkerman district who were moving to the Ural region to land assigned to them. He asked the Resettlement Department to place at the disposal of the Governor of Bessarabia one hundred and forty certificates for free travel by rail for families of displaced people (RSHA, f. 391, d. 3, c. 946, p. 537).

The Romanian villages appeared on the territory of Western Kazakhstan as a result of the Stolypin agrarian resettlement. “Many have gone on a long journey. The migrants reached Kazakhstan within six months. When they saw that the land was barren, some Romanians returned, while others, unable to, stayed. There are two villages in Aktobe region founded by the Romanians: Bessarabka and Moldavanka”. Every man, a breadwinner of a family, had the right to 16.5 acres of land. In the same Aktobe region there is the village of Bolgarka (about 100 km southwest of Aktobe), which was founded in 1905 by migrants from Bessarabia – Gagauz, Bulgarians and Romanians. The State Archive of the Aktobe region provides a list of the Romanian farms in the county (The State Archive of the Aktobe region – SAAR, f. 69, d. 2, c. 31, pp. 25–30).

In addition, two Bulgarian villages: Razumovka and Andrianovka, in which there could be a number of Romanians, were formed in 1908 – 1910 in Pavlodar district, Semipalatinsk region.

Small resettlement groups of the Romanians in the south and east of Kazakhstan were also found in some villages where other nationalities predominated: the above-mentioned Bolgarka, Razumovka and Andrianovka, in which the majority were Bulgarians and Gagauzes; Romanian village (Russian Old Believers); a number of Ukrainian villages.

The Russian State Historical Archive preserved a petition from Romanian settlers to be allocated land in the south of Kazakhstan.

Another channel for the appearance of the Romanians in the Steppe Region under tsarism was political exile and hard labour. One of the main regions from where political exiles and political prisoners were sent to Kazakhstan was the South-West of Tsarist Russia, which included Bessarabian province. At the beginning of the twentieth century and until the beginning of 1917, underground revolutionaries (Socialist Revolutionaries, Bolsheviks, anarchists, non-party participants in agrarian unrest, various kinds of expropriators) arrived in the east of the Russian Empire from Bessarabia and neighboring areas – the Romanians, the Russians, the Ukrainians, the Jews, etc. Among the Kazakh political exiles from Chisinau and Tiraspol meet as “the mainland” (Zemskov, 1991, pp. 151–165).

The harsh climatic conditions of Kazakhstan became a test for the displaced. The lack of timber in the counties created additional difficulties. The migrant peasants were unable to deliver timber 10–20 miles away, because they did not have horses. “They could not buy horses because the allowance” was given to them “in a limited amount and in parts” (Dyadichenko, & Chermak, 1906, p. 27).

The Romanian population that settled in the region under study, in the construction of winter dwellings, first adapted to local natural conditions and proceeded from the availability of local building materials. Therefore, in the steppe treeless areas of the region, like the Kazakhs, wild stone and turf were used as building materials. Houses were built with a flat earthen roof, which replaced both the roof and the ceiling. Even in forested areas, where the main type of building material was pine wood, many poor and middle-income owners built log houses with a flat earthen roof. Since a small amount of precipitation did not really bother the owners of such dwellings, they considered gable plank roofs a luxury and did without them (Khaziakhmetov, 1978, pp. 101, 102).

In 1915 – 1917, a number of Romanians arrived in Siberia as part of the general mass of refugees of World War I. In addition, with the beginning of this war, many Moldovans, being mobilized into the Russian Imperial Army from the Bessarabia province and places of the diaspora, ended up in the garrisons of cities in the eastern regions of Russia in 1914 – 1917, and some of them took an active part in the military political events of 1917 – 1920.

Deportation of Romanians to the territory of Kazakhstan

The process of forming the Romanian diaspora in Kazakhstan continued during the Soviet period. According to the All-Union Census of 1926, 5,611 Romanians lived in Siberia, Kazakhstan and Central Asia (including 345 in cities) (Shtyrbul, 2021, pp. 3–12).

It is easy to see that the vast majority of the Romanians in Kazakhstan at that time lived in rural areas. It is interesting that even in the 30s, in some Romanian villages in the east of the USSR, in particular Kutuzovka, education at primary schools was conducted in their native language. The Russian language was used in official settings and for interethnic communication.

In 1940, the Stalinist government again occupied Bessarabia and incorporated it into the USSR under the name Moldavian SSR, and the eastern Romanians began to be called the Moldovans and under this name their representatives live in the former Soviet republics, including Kazakhstan.

The years 1941 and 1948 – 1951 are tragic in the history of the Romanian people. This issue in the history of the Romanian diaspora has been studied most productively today, so we will dwell only on some numbers and facts. During the deportation of 1941, carried out

literally on the eve of the Great Patriotic War, about 3.7 thousand immigrants from Bessarabia as a result of the deportation of 1941 ended up in a special settlement in Kazakhstan (CSARK, f. 369, d. 1, c. 4614, pp. 3–8).

According to the decision of the Union Government and the Government of the Moldavian SSR in 1941, it was proposed to evict 11,280 households with a total number of family members – 40,800 people (NAM, f. 44, d. 1, c. 288, pp. 52–86).

In fact, 11,293 households with a total number of family members of 35,050 people were evicted.

In preparation for the operation, the Ministry of State Security of the Moldavian SSR registered 12,860 families for eviction.

Of the total number of special contingent subject to eviction, according to the approved cases, 1567 families were not raised for the following reasons¹:

- a) on the day of the operation, documents were identified and presented (members of collective farms, employees of the Soviet Army, etc.) – 688 families;
- б) sick, crippled and disabled for other reasons – 143 families;
- в) by the time of the operation, 631 families had left their permanent place of residence;
- г) by the time of eviction, 105 families had fled.

Currently, we have raised a question with the Ministry of State Security of the USSR about allowing the eviction of the remaining unevicted special contingent established to live in the Moldavian SSR in the amount of 3,633 people. This number includes 736 families with a total number of family members – 2,433 people and singles – 1,200 people (Pasat, 1994, pp. 485–486).

V.P. Zinoviev, in a polemic with some historians, quite correctly asserts that it is not entirely correct to classify deportations like the Romanian ones as ethnic, “they were most likely class-political...” (Zinoviev, 2019, pp. 36–48).

This opinion is confirmed, firstly, as a rule, by the social and political categories of deportees clearly defined in the declassified summary materials of the NKVD-MVD (in relation to Moldova, these are kulaks, bourgeois elements, accomplices of Romania and Germany, etc.) and, secondly, a comparison of the general territorial composition of the deportees with the actual national composition: not all those deported from Moldova were Romanians by nationality (among them there could be, and were, Ukrainians, Gagauzians, Bulgarians and even individual Russians), which is confirmed by the data of the NKVD-MVD on the actual national composition resettled. Thus, according to data as of January 1, 1953, the number of special Romanian settlers in the places of their settlement (which is mainly the eastern regions of the country, including in this case the Urals) amounted to 25,873 people (Zemskov, 1991, pp. 151–165).

On July 6, 1949, mass deportation of residents of the Moldavian SSR to Siberia and Kazakhstan began. The forced eviction from the republic of people of different nationalities: the Romanians, the Ukrainians, the Gagauz, the Bulgarians, the Jews, etc., was called Operation “South”. This was the second and most massive wave of deportations. It took place under the banner of the fight against the “kulaks”, the wealthy peasants. In total, 35,796 people were evicted, of which 9,864 were men, 14,033 women and 11,889 children (NAM, f. 2, d. 1, c. 3330, p. 31).

According to the Resolution signed on April 6, 1949, more than 11 thousand kulak families or 40,850 people were supposed to be sent outside the MSSR – to Kazakhstan, Altai Territory, Kurgan, Tyumen and Tomsk regions of the RSFSR. Along with the kulaks, the lists included

traders, former White Guards who collaborated with the Romanian administration, and priests who miraculously survived during previous purges. The main reason for deportations was hectares of land, cows and chickens: peasants had been paying increased taxes on their farms since 1944, and therefore automatically ended up on the “black” lists. Those who tried to evade this fate were sometimes reported by local residents (Krasilnikov, & Sarnova, 2009, pp. 478–485).

Operation South began at two o'clock in the morning on July 6 and ended at 20.00 on July 7, 1949. According to the order of the authorities, deportees had the right to take with them up to 1.5 tons of things per family. In fact, the majority barely had time to take the most necessary things or what they could carry away: a sewing machine or, for example, a barrel of honey. Many went to Kazakhstan and Siberia without warm clothing or tools for work. The soldiers were not given time to prepare thoroughly. All remaining property, including houses and land, was confiscated in favour of the state and collective farms.

They were transported to the railway stations by trucks. The deportees were then loaded into freight cars. 30 trains (1,573 wagons) were sent to Kazakhstan and Siberia in one day. The journey to the special settlements took from two to four weeks. The promised nurses and doctors, according to the official order, were not with the deportees. It is almost impossible to establish exact numbers today, but it is known that many died before reaching the place of exile (Pobol, & Polyan, 2005, p. 904).

Upon arrival, the deportees were resettled in local residents or barracks – some of them were built specifically for Operation South, the others remained from previous waves of repressions on the territory of the USSR.

In the 1940s, about 3,000 Romanians were forcibly resettled: 481 people to Aktobe region, 1,295 people to the former Guryev region (nowadays – Atyrau region), 684 people to the West Kazakhstan region (CSARK, f. 1490, d. 1, c. 8, p. 36).

The settlers found themselves in difficult climatic conditions. Everything that was allowed to be taken with you then had to fit into the knapsack. Many could not stand the hunger and cold. The Kazakhs, who were originally engaged in nomadic farming, despite the hard times, whenever possible, watered, fed and warmed the settlers in yurts (Bugai, 2013, pp. 43–76).

The results of the deportations exceeded all the authorities' expectations. From July to November of 1949, the percentage of peasant farms included in collective farms increased from 32% to 80%. By January of 1950, the share of collective farmers was 97%. Fearing new waves of evictions, peasants abandoned their lands and other property in favour of the state (NAM, f. 329, d. 3, c. 3574, p. 45).

In October of 1951, 35 thousand kulaks were re-deported from the Baltic states, Moldova (9.7 thousand), Western Ukraine, Western Belarus to the Krasnoyarsk Territory, the Yakut Autonomous Soviet Socialist Republic, Tiumen Region, Kazakhstan (CSARK, f. 369, d. 1, c. 4614, pp. 3–8).

According to Zemskov's data, as of January 1, 1953, 3,681 Romanians were exiled to the territory of the Kazakh SSR in 1941, and 5 Romanians in 1949. (Zemskov, 1991, pp. 151–165).

The process of adaptation of representatives of deported ethnic groups in Kazakhstan was difficult. Scattered over a vast territory and limited in contact with their compatriots, the special settlers were in danger of ethnocultural assimilation with the local population. In the new settlement areas the housing problem was very acute. It is worth noting that during the period under review, not only special settlers, but also the local population experienced an acute need for food and goods. Due to a weak financial situation, an extreme lack of food

supplies, warm clothes, and shoes, the process of adaptation to living conditions in a special settlement and to work was difficult.

It was only after Stalin's death in 1953 that the process of rehabilitation of forcibly displaced peoples began. Some Romanians were given the opportunity to return to their homeland, but most of them remained in Kazakhstan and became part of the multinational people of the republic.

Conclusion. The experience of the Romanians in Kazakhstan shows that an important condition for the adaptation and integration of ethnic groups into the Kazakh environment is their understanding of the historical path they traveled and the ethnocultural situation that developed in the country. And the processes that took place and are taking place in the post-Soviet space show the significance and awareness of this understanding.

The processes of integration and globalization impose new clichés on the development of ethnic groups, social groups, and diasporas. New formations are being created, new approaches to the study of these processes are being applied. Thus, when studying the history of the formation and development of the Romanians of Kazakhstan in the historical period we have declared, the features of its cultural and social formation, it is necessary to take into account the basis of the mentality that developed in a certain chronological period and dispersed place of residence. It is also necessary to pay attention to the importance of those ideological values that were formed in tsarist and the Soviet times. The Romanian diaspora of Kazakhstan, in the process of its development and formation at the end of the 19th – 20th centuries, turned into a stable component of the demographic, socio-economic, political and cultural life of the republic, setting an example of the successful adaptation of an ethnic group in a foreign cultural environment. Understanding and studying this experience by researchers will undoubtedly become the basis for its practical application in the field of social and interethnic harmony.

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ROMAN BAKHTALOVSKY (1897 – 1985), A PRIEST OF THE UNDERGROUND GREEK-CATHOLIC CHURCH: EVERYDAY LIFE THROUGH THE PRISM OF A CRIMINAL CASE

Abstract. *The purpose* is to do the research on the possibilities of revealing the everyday life of a priest Roman Bakhtalovsky by studying the criminal case against him on September 13, 1949, by the Soviet law enforcement agencies. **The research methodology** is based on the principles of historicism, systematicity, scientificity, objectivity, and the application of source research methods, in particular the method of internal criticism of sources. **Scientific Novelty.** Criminal cases as a type of primary sources, despite their peculiarities (a strong subjectivity, individual inaccuracies, a low level of representativeness, certain arbitrariness of interpretation), contain a significant resource of

factual data, thereby supplementing the source base on the history of everyday life. **Conclusions.** The testimonies of the defendants (in particular, Father Roman Bakhtalovsky), due to their “subjectivity,” require a careful comparison with other primary sources, including memoirs, eyewitness accounts of the events, periodicals of that historical era, memoranda, and diaries. At the same time, they contain facts that reflect the everyday life of not only R. Bakhtalovsky himself, but also of many clergymen of the period of the “catacomb” Greek-Catholic Church, shedding light on their biography, appearance, material security, ideological beliefs, communicative environment, mentality, etc. The investigation materials reflect the subjective nature of these interrogations, bias in the selection of witnesses, facts of a psychological pressure on clergy and lay people. The criminal case as a source contains facts of R. Bakhtalovsky’s detention, the circumstances of his arrest by the Soviet special agencies, interrogations, examinations of his handwriting, decisions on bringing charges, a sentence, etc.

Key words: criminal case, Father Roman Bakhtalovsky, underground Greek-Catholic Church, historical monument, everyday life, Soviet special agencies.

СВЯЩЕННИК ПІДПІЛЬНОЇ ГРЕКО-КАТОЛИЦЬКОЇ ЦЕРКВИ РОМАН БАХТАЛОВСЬКИЙ: ПОВСЯКДЕННЕ ЖИТТЯ КРИЗЬ ПРИЗМУ КРИМІНАЛЬНОЇ СПРАВИ (1897 – 1985)

Анотація. Мета статті: з’ясувати ступінь інформативності кримінальної справи на підпільного греко-католицького священника Романа Бахталовського як періоджерела до вивчення історії повсякденності. **Методологія дослідження** ґрунтується на принципах історизму, системності, науковості, об’єктивності, застосування джерелознавчих методів, зокрема методу внутрішньої критики джерел. **Наукова новизна.** Кримінальні справи як вид періоджерел, попри свої особливості (виражений суб’єктивізм, окремі неточності, низький рівень репрезентативності, певну довільність трактування) містять значний ресурс фактологічних даних, доповнюючи тим самим джерельну базу з історії повсякденності. **Висновки.** Свідчення підсудних (зокрема отця Р. Бахталовського) в силу їхньої “суб’єктивності” потребують уважного зіставлення з іншими періоджерелами, зокрема, мемуарами, спогадами про нього очевидців подій, періодичними виданнями тієї історичної епохи, нотатками для пам’яті, щоденниками. Водночас вони містять факти які, відбивають повсякденне життя не лише самого Р. Бахталовського, а й багатьох священнослужителів періоду “катакомбної” ГКЦ, проливають світло на їхню біографію, зовнішній вигляд, матеріальне забезпечення, ідеологічні переконання, комунікативне середовище, етос (спосіб життя), ментальність тощо. Матеріали слідства відбивають суб’єктивний характер допитів, тенденційність у доборі свідків, факти психологічного тиску на духовних і світських осіб. Кримінальна справа як джерело вміщує пізнавальні факти затримки Р. Бахталовського, обставини його арешту радянськими спецорганами, допити, експертизи його почерку, постанови про пред’явлення звинувачення, матеріали вироку тощо.

Ключові слова: кримінальна справа, отець Роман Бахталовський, підпільна Греко-католицька Церква, історична пам’ятка, повсякденне життя, радянські спецоргани.

Problem Statement. In our opinion, the decade of the Russo-Ukrainian war of 2014 – 2024 has brought to light a number of important socio-cultural issues, because at the present stage the Russian Federation, as a direct heir of the USSR, continues to pursue a shameful policy of levelling and eliminating of people who, to a greater or lesser extent, do not fit into its ideological matrix. Hence, there is the researchers’ substantive focus on “Sovietism” – culture, mentality, ethos, attitude to society, etc. It is important that this segment should, first of all, be considered in the socio-cultural dimension, since an excursion into the historical past is needed to search for and recreate similar circumstances and episodes with the participation of the Soviet law enforcement agencies.

This issue, in our opinion, “provokes” another, anthropocentric one, because it is capable of “raising to the surface” a decidedly different person who does not claim to be “famous”

or “outstanding” according to established academic visions and characteristics. But the methodological principles of the history of everyday life as a separate scientific direction of historical science have diversified the search tools, introduced a fundamentally new search method – “not to sift a single grain” (“Do not lose any grain” which means “do not lose any single detail”). This method involves a holistic approach to studying the historical “little” person down to the smallest details of life, and encourages more diverse and deeper monitoring of primary sources of a personal origin: “memories”, epistolary writings, diaries, etc.

Review of Recent Research and Publications. To some extent, the issues raised have already become the subject of research by Ukrainian historians. There should be mentioned the book by Nadiya Holeiko, “Bless us from Eternity. Confessor of the Faith of the 20th Century Servant of God Father Roman Bakhtalovsky, ChNI”, published in Lviv in 2017 (Holeyko, 2017). The publication does not claim to be scientific, although it contains some excerpts from R. Bakhtalovsky’s criminal case. It is also worth noting the work of R. Bakhtalovsky, “The Apostle of the Unity of Our Times. Memories”, which is dedicated to the life and work of Mykola Charnetsky, the Ukrainian bishop (Bakhtalovsky, 2001). In the book there is observed a subjective idea of the author’s worldview – R. Bakhtalovsky, his inner world, beliefs, interests. In the context of methodology of the history of everyday life as a direction of considerable interest are the studies of famous Ukrainian scholars – Olha Koliastruk and Oleksandr Udod. O. Koliastruk calls for a more thorough study of such situations as arrests, imprisonment, stay in special settlements of “little people”. It is certain that such plots enable a more complete study of a historical era, encourage understanding of relationship peculiarities between the state and citizen during a certain historical period (Koliastruk, 2007; Koliastruk, 2008; Koliastruk, 2019; Koliastruk, & Koliastruk, 2020). In his research, Oleksandr Udod outlines the advantages of the history of everyday life as a separate direction of historical research (Udod, 2005; Udod, 2010) The article by Kyiv historian Tetiana Zabolotna “The History of Everyday Life – “A Panacea for All Diseases” or a Trap for the Historian?” caused some resonance among everyday historians and fans of this direction (Zabolotna, 2010). For a more complete understanding of the historical era in which Father R. Bakhtalovsky lived, we have included informative articles by the following authors (Holeyko, 2014; Delyatynsky, Yehreshiy, & Solovka, 2016; Havrysh, 2021; Mishchanyn, & Isak, 2023; Haliv, 2013; Haliv, & Ohar, 2021; Popp, & Kantor, 2021; Popp, & Medvid, 2024; Yehreshiy, 2022). Some methodological aspects of studying this problem are highlighted in the works of Fernand Braudel (Brodell, 1995), Vitaliy Pidhayetsky (Pidhayetsky, 2005), Vitaliy Dmytrenko and Vita Dmytrenko (Dmytrenko, & Dmytrenko, 2020), Nadiya Levytska, Lyudmyla Luts and Bohdan Yakymovych (Levytska, Luts, & Yakymovych, 2022), Oleksandr Bondarenko and Anatoliiy Kotsur (Bondarenko, & Kotsur, 2023), Mykola Haliv and Vasyl Ilnytskyi (Haliv, & Ilnytskyi, 2021; Ilnytskyi, & Haliv, 2022).

The purpose is to do the research on the possibilities of revealing the everyday life of a priest Roman Bakhtalovsky by studying the criminal case against him on September 13, 1949, by the Soviet law enforcement agencies.

Results of the Research. The criminal case of Roman Bakhtalovsky details the circumstances of the priest’s detention and arrest. The priest was detained on September 13, 1949, in accordance with Article 100 of the Criminal Procedure Code of the Ukrainian SSR, for 24 hours to determine his identity (State Archives in Ivano-Frankivsk Region (SAIFR), f. R-2157, d. 1, c. 7498P, in 3 vols., vol. 1, p. 241). The next day, a warrant was issued for the arrest of R. Bakhtalovsky, and on September 15, 1949, the priest was arrested. As a preventive

measure, Father was placed in custody. In the arrest warrant for R. Bakhtalovsky it was stated that “while living in the territory temporarily occupied by the German invaders in the city of Stanislaviv, he worked as the proto-abbot of the Greek-Catholic Redemptorist monastery and carried out anti-Soviet nationalist work among the population” (SAIFR, f. R-2157, d. 1, c. 7498P, in 3 vols., vol. 1, p. 242).

The subject matter of scientific interest for studying the daily life of R. Bakhtalovsky during a certain historical period is represented by a characteristic attributive component of all criminal cases – the prisoner’s questionnaire. It clearly states the year and place of his birth (November 21, 1897, the village of Yabluniv, Ternopil region); profession and specialty (a priest); last place of work or occupation before arrest (until April of 1946, R. Bakhtalovsky was the abbot of the Redemptorist Fathers monastery in Stanislaviv, later became illegal); nationality (Ukrainian), citizenship (USSR); party affiliation (R. Bakhtalovsky was not the party member); education (R. Bakhtalovsky obtained a higher theological education diploma) (SAIFR, f. R-2157, d. 1, c. 7498P, in 3 vols., vol. 1, p. 245). The arrestee’s questionnaire also includes his origin (according to him, he came from a priestly family); a criminal record (R. Bakhtalovsky had no criminal record as of 1949). When asked by the investigator whether he had participated in the German-Soviet war, he gave a negative answer, but admitted that at that historical time he was in the occupied territory – since 1942 he had lived in Stanislaviv as “an illegal monk priest, abbot of the Redemptorist monastery”. As indicated in the “family composition” column, R. Bakhtalovsky’s father died in 1927, his mother – in 1938. The questionnaire records that R. Bakhtalovsky was not married and was childless, although he had a brother, Stepan (born in 1889) and a sister, Sofia (her surname after getting married – Saturdayska), born in 1885.

Criminal cases also feature a verbal portrait, which quite prominently characterizes the appearance of a person, in particular Roman Bakhtalovsky. The priest, as this section of the criminal case shows, was of an average height (165–170 cm), of full build, had a short neck, blue eyes, a round face, gray hair, a high forehead, straight eyebrows, a large nose and small ears and mouth, thin lips, drooping shoulders, and a straight chin. Father Roman Bakhtalovsky had no special characteristics, except for the “habit of bending his back to the right”.

More detailed information on the biography of Father Roman Bakhtalovsky can be found in the minutes of the first interrogation of the priest, which took place in Chernivtsi on September 13, 1949 (SAIFR, f. R-2157, d. 1, c. 7498P, in 3 vols., vol. 1, p. 273). As the investigation materials show, in 1915 R. Bakhtalovsky graduated from the Ukrainian State Gymnasium in Kolomyia. That same year, he entered the Greek-Catholic Theological Seminary in Stanislaviv, but in 1919, without completing the last year of the seminary, he entered the monastery of the Redemptorist Fathers “Bo Plateau” in Belgium, where he continued his education for a year. In 1920, Father R. Bakhtalovsky returned to Lviv, where he was assigned to the monastery of the Redemptorist Order in the suburbs of Lviv – the village of Zboishcha. In 1921, Stanislaviv Bishop Hryhoriy Khomyshyn ordained R. Bakhtalovsky as a priest. During the same time, he studied at the Faculty of Slavic Languages of Jan-Kazimierz University of Lviv (nowadays – Ivan Franko National University of Lviv). From 1922 to 1942 he served as a priest and teacher of Theology, as well as Mathematics and Literature in the monasteries of the Redemptorist Order in Kovel, Holosko and Tukhiv. In 1942, Father R. Bakhtalovsky was appointed an abbot of the monastery of the Redemptorist Fathers in Stanislaviv, where he remained until the monastery was liquidated in the spring of 1946. Due to the experiences caused with the liquidation of the monastery that same year, he

“fell ill with a nervous illness and liver inflammation”, and went to his sister Sofia Saturdayska in Kolomyia for treatment, where until the end of June 1946 he lived in Sobieski Street, 56 (nowadays – Mykhailo Hrushevsky Avenue). For a short period of time, he also lived in the apartment of the former senior nun of the Basilian Sisters, Dariia Monastyrska (the disabled from birth), who lived in Hlinka Street at that time (nowadays – Liubomyr Huzar Street) in Kolomyia (SAIFR, f. R-2157, d. 1, c. 7498P, in 3 vols., vol. 1, p. 345). At the end of June 1946, Father Roman Bakhtalovsky left for the village of Synkiv, near Zalishchyky, Ternopil region, to visit his old acquaintance Stefa Demianchuk, who for a short period of time directed the women’s choir in the church of the Redemptorist Fathers in the city of Stanislaviv. Her husband was once repressed by the Soviet authorities for political crimes, which prompted her to move to her mother, whom she helped with farming. In the autumn of 1946, Father R. Bakhtalovsky returned to live with his sister in Kolomyia, where he stayed for about a month, after which he rented a room for some time from a Polish citizen, the widow Markela Golynska.

By the way, a Roman Catholic priest, who later left for Poland, helped R. Bakhtalovsky to solve the housing issue in Stanislaviv. This priest helped him rent an apartment in Vovchynetska Street. In 1947, R. Bakhtalovsky managed to find housing in this city in Kapitulna Street, 12 (nowadays – Vira Levytska Street in Ivano-Frankivsk), the owner was the inspector of the regional drug control department, Ivan Pakholkiv, to whom he paid 300–400 rubles per room per month (SAIFR, f. R-2157, d. 1, c. 7498P, in 3 vols., vol. 1, p. 281). The priest left I. Pakholkiv’s apartment due to some troubles that arose with the owner of the apartment due to the priest’s lack of a residence permit.

The priest also spent the winter of 1947 – 1948 in Stanislaviv with the family of a secondary school teacher named Kumanovsky. R. Bakhtalovsky spent the summer of 1947 with the Tselevych family in the village of Tsutsylyv, Stanislaviv region. From August of 1947, Roman Bakhtalovsky lived in Chernivtsi without a residence permit, where he settled in the apartment of a teacher Franz Karlovych Kinash in Dzhabula (Dzhabayeva) Street, 17, app. 2 (nowadays – Pavla Chubynsky Street). Renting an apartment from the latter, R. Bakhtalovsky paid the owner 600 Soviet rubles per month. The priest lived in this apartment until the moment of his arrest, occasionally leaving for Stanislaviv (SAIFR, f. R-2157, d. 1, c. 7498P, in 3 vols., vol. 1, p. 275). In Chernivtsi, according to him, he focused on his education, he was engaged in writing a theological treatise dedicated to the Blessed Virgin Mary, and was treated by a famous specialist, Dr. Zuflucht, who lived in Ruska Street at that time. As a rule, the people who rented accommodation to R. Bakhtalovsky were proven ones whom the priest truly trusted.

In the field of studying the history of everyday life, the description of the clergyman’s property, which also appears in the search report of his residence, is of great importance. This, although schematic, makes it possible to present the ethos, to imagine the priest’s views, his inclinations, habits, preferences, and even his intellectual level and provision level. However, due to the fact that R. Bakhtalovsky had no permanent residence in recent years, it is difficult to create a complete picture of the property that belonged to the Greek-Catholic priest. According to the protocol of the personal search of the priest by the Soviet secret services, on September 16, 1949, in addition to his passport, 256 Soviet rubles and 43 American dollars were found and confiscated from him. Some items of church utensils (a church chalice and a yellow metal spoon) were found in the apartment. During the liquidation of the Redemptorist Fathers monastery, according to the order of R. Bakhtalovsky,

religious literature and monastic utensils were taken out of the monastery and transferred for safekeeping to individual residents in Stanislaviv. In December of 1949, the Soviet special services discovered a cache of weapons in Volodymyr Borysiuk's house property, a former parishioner of the Redemptorist Fathers monastery (he lived in Stanislaviv, in Rivna Street, 16) (SAIFR, f. R-2157, d. 1, c. 7498P, in 3 vols., vol. 1, p. 242). The hidden valuables were found in the house owner's property near the well. In addition, during a search in the apartment there was revealed a white cigarette case, a mechanical 88-gram pocket watch made of a yellow metal, a wristwatch with a bracelet made by the "Arcadiia" company of a yellow metal, a white metal pocket watch made by the "Omega" company, a medal made of a yellow metal, and a brooch with a blue stone.

In a metal container from a canned food store, which was discovered in the chicken coop of V. Borysiuk's house by law enforcement officers, there were 139 American dollars, 10 German marks, 55 Soviet rubles, 20 Polish zlotys, a few Austrian crowns, and French francs were also found. In addition, yellow metal rings with blue and green stones were found in the metal jar. The list of seized items is eloquently confirmed by receipts dated December 26, 1949, which belonged to Father R. Bakhtalovsky. As the priest admitted during the investigation, the found money was the remains of donations from believers, which were intended for the development of the Redemptorist Fathers monastery in Stanislaviv.

According to R. Bakhtalovsky, during his illegal stay, he received means of subsistence from three sources: firstly, owing to a gradual sale of part of the former Redemptorist Fathers monastery's property in Stanislaviv by the parishioners of the monastery church. Secondly, owing to financial donations of believers, which he periodically received from them. Former parishioners of the monastery church, spiritual and secular figures visited him periodically: a priest-monk Anton Krochak, a forty-nine-year-old abbess of the Basilian monastery in Stanislaviv (Maria Isopenko), a twenty-five-year-old tailoress Volodymyra Zhovkivska (she worked in one of the artels in Stanislaviv), a thirty-year-old teacher from Nadvirna Stefaniia Tkachuk (for a short period of time she was a deputy of Nadvirna town council), a thirty-five-year-old Yevheniya Rostynska (she was the wife of a lecturer at the medical university in Stanislaviv, she lived in Vatutina Street in Stanislaviv (nowadays – Kruka Street) and other people (SAIFR, f. R-2157, d. 1, c. 7498P, in 3 vols., vol. 1, p. 316). And thirdly, some material assistance (approximately 500–600 Soviet rubles) was provided to R. Bakhtalovsky personally by Joseph de Vocht, the proto-abbot of the Redemptorist Order in the USSR. As the priest admitted during the investigation, he had been to the Hoshivsky Monastery several times in order to sell some items from the church utensils of the former Redemptorist Fathers monastery.

By the way, the former abbess of the Basilian monastery, mentioned above, tried to help R. Bakhtalovsky obtain a new passport in the name of his mother's maiden name. It was assumed that the priest would bear the surname Herman. However, this attempt remained unrealized for various reasons. In addition, on the instructions of Father R. Bakhtalovsky, Yosyfa (Maria Isopenko) sold icons and gave the collected money to the Father. Priest Hryhoriy Melymuka helped R. Bakhtalovsky obtain a birth certificate (before the Lviv pseudo-council, H. Melymuka served as a priest in the Church of the village of Ostrivets, without converting to Orthodoxy).

The criminal case brought against underground priests characterizes the contact environment of Father Roman Bakhtalovsky quite vividly – the case includes the names of the "catacomb" priests who visited the priest during his illegal residence. The biographies of some of these

priests are unknown not only to a narrow but also to a wide circle of scholars. In particular, we come across the names of such priests as: a priest-monk Ivan Dmukhovsky (his brother was a member of the OUN); Ivan Valnytsky (after rejecting the Lviv pseudo-council, he guarded one of the companies in the city of Stanislaviv, and was also the confessor of R. Bakhtalovsky; Yevhen Pelek; a monk Avkseniy Kinashchuk and the others. During interrogations, R. Bakhtalovsky, “under pressure” of the special services, had to specify the data about these people. In particular, Yevhen Pelek, born in 1920, was a former priest, a Redemptorist monk in Stanislaviv. After the liquidation of the monastery, he lived for some time without any specific occupations, and later he was recalled to the monastery in Holosko (SAIFR, f. R-2157, d. 1, c. 7498P, in 3 vols., vol. 1, p. 313). Avksentiy Kinashchuk was a little over 40 years old, also a former brother-monk of the Redemptorist Fathers monastery, and lived in Stanislaviv for some time. Anton Krochak (40 years old, a former Redemptorist monk. After the monastery was liquidated, he moved to Borshchiv, Ternopil region, to his sister for some time). Yaroslav Soviak was the parish priest of Broshniv before the Lviv pseudo-council, although he was born near Drohobych. Petro Hereliuk was a former student of the Theological Seminary. Soon he was arrested and convicted by the Soviet authorities. The interrogation also included priest Kutsak Vasyl, born in 1920, who was born in Lviv region and studied at the “Juvenat” school in Zboishcha until 1936. For some time he was a Redemptorist monk in the village of Holosko, from 1939 to 1941 he was in Tukhiv monastery, later in the monastery of the Redemptorist Fathers in Stanislaviv. In 1942, Vasyl Kutsak was ordained a priest in Dashava.

The criminal case also includes the names of the fathers of the underground Greek Catholic Church, Mykola Khmelevsky and Ivan Ziatyk. The latter was a hieromonk of the Order of the Redemptorist Fathers and a teacher of Theology at the Lviv Redemptorist Monastery, and was later transferred to Zboishcha, where he was the abbot of the monastery for some period of time.

Criminal cases illustrate the everyday life of a Greek-Catholic priest in an illegal position – the specifics of his ministry, his communication with the clergy who decided to join the Initiative Group, and then become priests of the Russian Orthodox Church. And on the contrary, the clergy who decided to “not sign Orthodoxy” or gave a receipt to law enforcement agencies that they would not perform religious services or did not give this receipt were in an illegal situation, as Roman Bakhtalovsky. During interrogation, R. Bakhtalovsky admitted that he was and remained a convinced Greek-Catholic, and took a hostile position towards the Initiative Group. During interrogation, R. Bakhtalovsky named the surnames of the priests with whom he had conversations about converting to Greek Catholicism: Vasyl Baran, who lived in Stanislaviv at that time (R. Bakhtalovsky met him only once in 1946); Fathers Malynovsky and Sleziuk, who did not convert to Orthodoxy and were both arrested by the Soviet authorities soon; Father Dobriansky, who did convert to Orthodoxy and, as of the late 1940s, lived in Ternopil region. During the interrogation there was also mentioned a fifty-two-year-old priest from the village of Trukhaniv, Skole district, Drohobych region, Ksenofont Kersha, who was also arrested by the Soviet authorities soon after, and Yosyf Savrash (who converted to Orthodoxy despite R. Bakhtalovsky’s warnings). During interrogation, Roman Bakhtalovsky also mentioned the surname of a priest from the town of Horodenka, Roman Vynnychuk (SAIFR, f. R-2157, d. 1, c. 7498P, in 3 vols., vol. 2, p. 304).

Criminal cases contain information regarding the internal discipline of the clergy of the Greek-Catholic Church in the second half of the 1940s. If a priest had previously “signed Orthodoxy” but decided to return to the fold of Greek-Catholicism, then in the presence of

two witnesses he had to write a statement in which he expressed his desire and give a “promise to be faithful to the Greek-Catholic Church until death”. After that, Roman Bakhtalovsky confessed the returnee. According to the priest, until April of 1946 (i.e., before the liquidation of the Redemptorist Fathers monastery), he had accepted only five applications from fathers who had changed their minds about belonging to the Russian Orthodox Church (the Soviet investigators did not confirm this figure, citing a sevenfold higher figure – 35 fathers). For the purpose of conspiracy, on the instructions of R. Bakhtalovsky, a former novice of the Redemptorist Fathers monastery, Iliia Menchuk, hid the statements previously sealed in a bottle in the monastery garden, but later changed his mind and destroyed them.

The criminal case, as a primary source, vividly conveys the mentality of the prisoner, certain traits of his character, etc. Father Roman Bakhtalovsky, in order not to betray people close to him, at first categorically denied his communications with the priests of the underground Greek-Catholic Church. To encourage the clergyman to give a truthful testimony, the Soviet special services often organized face-to-face meetings: with the abbot of the Basilian monastery in Stanislaviv, Hryhory Balahurak (April 19, 1950 (investigators were interested in the method of distributing and sending out leaflets of an anti-Soviet nature)) (SAIFR, f. R-2157, d. 1, c. 7498P, in 3 vols., vol. 2, p. 107); with the priest of the underground Greek-Catholic Church, Yaroslav Soviak, and the nun Yosyfa (Maria Isopenko) mentioned above. In particular, face-to-face meetings with Ya. Soviak and Sister Yosyfa exposed Father R. Bakhtalovsky for illegally sending the nun abroad for contacts with representatives of the Ukrainian Christian Church, and for talking to Ya. Soviak about his illegal crossing the border with the help of the OUN underground. After face-to-face interviews, Father Roman Bakhtalovsky was often forced to revise his previous confessions. Sometimes, in order to force the priest to tell the truth, the Soviet secret services provided “necessary quotes” from transcripts of interrogations of previously arrested fathers.

Finally, on June 14, 1950, the Deputy Minister of State Security of the Ukrainian SSR, Major General Yepypenko, signed an indictment in the investigative case of Roman Bakhtalovsky. Father R. Bakhtalovsky was accused by the Soviet investigative bodies of the fact that, “in 1922, after returning from Belgium as a hieromonk of the Order of the Redemptorist Fathers, he carried out active missionary work to spread Catholicism among the believers of the Orthodox Church in Volyn, he conducted anti-communist propaganda and spread slanderous thoughts about the USSR. In 1939, R. Bakhtalovsky fled to the territory of the so-called General Governorate, where he also carried out anti-Soviet and missionary activities. R. Bakhtalovsky maintained illegal ties through OUN members with the proto-abbot of the Redemptorist order, de Vocht, who was in Lviv. During the German-fascist occupation of Ukraine, R. Bakhtalovsky, as the abbot of the Redemptorist monastery in Stanislaviv, actively helped the Germans and was used by the SD to obtain confessions from those arrested in Stanislaviv prison. After creating an Initiative group to reunite the Greek-Catholic Church with the Russian Orthodox Church, R. Bakhtalovsky made criminal ties with the illegal Bishop Balahurak, with whom he launched an active struggle against the Initiative group. At the end of 1945, R. Bakhtalovsky wrote an extensive report of an anti-Soviet slanderous nature to the Vatican, which, with Balahurak’s sanction, he tried to send abroad owing to the OUN’s foreign relations, using Isopenko, Heryliuk, and Father Soviak as couriers” (SAIFR, f. R-2157, d. 1, c. 7498P, in 3 vols., vol. 1, pp. 244, 245).

In addition, R. Bakhtalovsky was accused of writing letters of anti-Soviet content in which he called on Greek-Catholic priests who had converted to Orthodoxy to return to the bosom

of the UGCC; he held illegal religious services and delivered anti-Soviet sermons; he was the author of anti-Soviet nationalist documents and kept a number of them. We should add that Father Roman Bakhtalovsky was exposed by the testimonies of the previously arrested Bishop Hryhoriy (Balahurak), Archimandrite Klymentiy (Sheptytsky), Fathers Ya. Soviak, Ye. Pelekh, I. Kotiv, a monk I. Menchuk, the nun Yosyfa (M. Isopenko), and a number of other witnesses. A priest R. Bakhtalovsky was also exposed through face-to-face meetings with the above-named clergymen, as well as through physical evidence and operational materials (SAIFR, f. R-2157, d. 1, c. 7498P, in 3 vols., vol. 1, p. 247).

In addition, during the arrest and search of R. Bakhtalovsky, the manuscripts of anti-Soviet content were found: "The Idea and Act of Ukraine" (on ten sheets), "The Relation of Religion to Nationalism" (on eighteen sheets), "Because Our Emigration" (on eighteen sheets). Considering that the manuscripts listed above were material evidence that exposed R. Bakhtalovsky in "criminal activities," the Soviet special services decided to subject the above works to expert examination. The samples of Roman Bakhtalovsky's handwriting were presented in the form of his autobiography and diary. As a result of a comparative study of the handwriting of the performers of all three anti-Soviet manuscripts, it was determined that they fully corresponded to each other in terms of general and personal characteristics, i.e. they gave reason to assert that they were performed by the same person. We should add that Father Roman Bakhtalovsky agreed to the charges, pleading guilty.

Therefore, guided by Article 204 of the Criminal Procedure Code of the Ukrainian SSR, investigative case No. 149434 on the indictment of H. Balahurak, R. Bakhtalovsky and R. Soviak (during the investigation, due to the similarity of the criminal proceedings, the case of the three priests was combined into one) was sent for consideration by the Special Meeting of the MGB of the USSR. It was suggested applying to the clergy a punishment of 25 years each with confiscation of a personal property (SAIFR, f. R-2157, d. 1, c. 7498P, in 3 vols., vol. 1, p. 251). The sentence of 25 years was approved by the Prosecutor of the Ukrainian SSR R. Rudenko on June 24, 1950.

However, an extract from the minutes No. 48 of the Special Meeting at the USSR Ministry of State Security dated October 11, 1950, referred to the sending of Father R. Bakhtalovsky to a correctional labour camp for a term of ten years, from September 15, 1949 (i.e. from the day of his arrest). It was decided to confiscate the property of Father R. Bakhtalovsky. Soon a special order was issued according to which Roman Bakhtalovsky was sent to the Ozerny camp of the Ministry of Internal Affairs (SAIFR, f. R-2157, d. 1, c. 7498P, in 3 vols., vol. 1, p. 251). Later, the priest ended up in a special camp in Sosnovka, Irkutsk region, where he worked as a hospital orderly for five years.

In 1955, Father R. Bakhtalovsky was granted amnesty (Holeyko, 2017, p. 91). The certificate of release of R. Bakhtalovsky from places of exile, issued by the head of the correctional labour camp in the village of Sosnovka, Irkutsk region, dated November 14, 1955, noted that the clergyman was released by the decision of the permanent session of Irkutsk regional court dated November 1, 1955 due to illness (in 1951, the clergyman underwent a complex surgical hernia operation). Roman Bakhtalovsky was released on November 30, 1955, and lived in the town of Kolomyia permanently, where he served as a priest underground.

For his active work in the Congregation and in educating young people for the priesthood and monastic orders, on October 13, 1968, Father Roman Bakhtalovsky was detained by the Soviet law enforcement agencies again. The priest was arrested for the second time and

sentenced to three years of strict regime and five years of exile in Krasnoyarsk Krai. The trial of the 72-year-old priest took place in Kolomyia from June 10 to 13, 1969. On August 22, 1969, Roman Bakhtalovsky was sent to serve his sentence in the Mordovian correctional labour camps, and later to the village of Ignash, Krasnoyarsk krai (Holeyko, 2017, pp. 113, 114). Only on September 27, 1976, at the age of 78, the priest returned to Ukraine and settled in the town of Khmilnyk, Vinnytsia region (Roman Bakhtalovsky was forbidden to return to Ivano-Frankivsk region). The priest lived in Khmilnyk for more than nine years, where he died on October 6, 1985, at the age of 88. Father Roman Bakhtalovsky was buried in the local cemetery (Holeyko, 2017, p. 128).

Conclusions. The testimonies of the defendants (in particular, Father Roman Bakhtalovsky), due to their “subjectivity,” require a careful comparison with other primary sources, including memoirs, eyewitness accounts of the events, periodicals of that historical era, memoranda, and diaries. At the same time, they contain facts that reflect the everyday life of not only R. Bakhtalovsky himself, but also of many clergymen of the period of the “catacomb” Greek-Catholic Church, shedding light on their biography, appearance, material security, ideological beliefs, communicative environment, mentality, etc. The investigation materials reflect the subjective nature of these interrogations, bias in the selection of witnesses, facts of a psychological pressure on clergy and lay people. The criminal case as a source contains facts of R. Bakhtalovsky’s detention, the circumstances of his arrest by the Soviet special agencies, interrogations, examinations of his handwriting, decisions on bringing charges, a sentence, etc.

A careful reading of criminal cases reveals the historical era in which the activities of underground clergymen unfolded, shedding light on the methods of the Soviet special services, dealing with individuals (in this case, underground fathers of the Greek-Catholic Church) who posed a danger to the Soviet state.

Criminal cases, as a special type of historical monuments, bring new impulses to the study of the history of everyday life, encourage us to see and understand the historical past in a new way, in particular the place of the underground Greek-Catholic clergy in the socio-cultural life of the region.

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**PERPETRATORS OF WORLD WAR I IN THE INTERPRETATION
OF EMPEROR WILHELM II HOHENZOLLERN: VERIFICATION
OF THE HISTORICAL VERSION**

Abstract. *The purpose of the article is to verify the historical version of the German Emperor Wilhelm II Hohenzollern regarding the perpetrators of the outbreak of the World War I. The research methodology is based on the principle of basic expansion of the interpretive field of the issue under research, verification, content analysis, comparative historical and comparative lexical methods, quantitative method when using thematic statistical research. The scientific novelty of the study consists in the return to scientific circulation of the historical version of Wilhelm II Hohenzollern regarding the culprits of World War I and the verification of this concept based on the study of the memoirs of the last German emperor; memories and works of politicians and diplomats from Germany, England, France, as well as analytical works of the Russian General headquarters, contemporary press, published diplomatic documents and statistical data.*

Conclusion. *In his memoirs, the former German Emperor Wilhelm II Hohenzollern presented “historical tables” that were supposed to prove the falsity of the accusations of Germany and Austria-Hungary in the outbreak of World War I. The key thesis is that the war for Germany, under the conditions of the united and overwhelming forces of the Entente, looked like a losing strategy. The analysis of indicators of military capabilities presented in the article confirms this thesis of Wilhelm Hohenzollern and proves the impossibility of conducting a successful long-term war against the overwhelming forces of the enemy in a situation of strategic encirclement by enemy countries from the West, East and North (the advantage of the British Navy). France and Russia appear in the memoir as the behind-the-scenes power and the executive power. Great Britain, unlike France, did not directly contribute to the growth of Russia’s military power. The personal sources we have examined, such as the memoirs of French and British politicians and diplomats, as well as the fact that Russia was the first major European country to start military mobilization and create a real threat of war against Austria-Hungary and Germany, encourage us to take a closer look at the German version of events. In the end, Germany chose the established practice of declaring war on countries that threatened it in order to legitimately start mobilizing in response to Russian mobilization efforts. It is significant that British politicians recognized the peace-loving, or at least non-aggressive, mood in Berlin on the eve of the war.*

Key words: *World War I, perpetrators, German Empire, Austro-Hungarian Empire, Russia, France, England, memoirs, historical tables, statistical data.*

ВИНУВЦІ ПЕРШОЇ СВІТОВОЇ ВІЙНИ В ІНТЕРПРЕТАЦІЇ ІМПЕРАТОРА ВІЛЬГЕЛЬМА II ГОГЕНЦОЛЛЕРНА: ВЕРИФІКАЦІЯ ІСТОРИЧНОЇ ВЕРСІЇ

Анотація. *Мета статті* полягає у верифікації історичної версії німецького імператора Вільгельма II Гогенцоллерна стосовно винуватців розв'язання Першої світової війни. **Методологія дослідження** ґрунтується на принципі базового розширення інтерпретаційного поля обраної проблеми, верифікації, контент-аналізу, порівняльно-історичного та порівняльно-лексичного методів, квантитативного методу при використанні тематичних статистичних досліджень. **Наукова новизна** дослідження полягає у поверненні до наукового обігу історичної версії Вільгельма II Гогенцоллерна стосовно винуватців розв'язання Першої світової війни та верифікації цієї концепції на підставі вивчення мемуарів останнього німецького імператора, спогадів та праць політиків і дипломатів Німеччини, Англії, Франції, а також аналітичних праць російського Генерального штабу, тогочасної преси, опублікованих дипломатичних документів і статистичних даних.

Висновки. У своїх мемуарах колишній німецький імператор Вільгельм II Гогенцоллерн представив так звані “історичні таблиці”, які мали засвідчити брехливість обвинувачень на адресу Німеччини та Австро-Угорщини у розв'язанні Першої світової війни. Ключова теза – війна для Німеччини, в умовах об'єднаних та переважальних сил Антанти, була стратегічно програшною справою. Аналіз показників військових спроможностей підтверджує цю думку Вільгельма Гогенцоллерна й засвідчує неможливість ведення успішної тривалої війни проти переважальних сил противників. Німеччина була оточена ворожими країнами із Заходу, Сходу та Півночі (флот Великої Британії). Франція та Росія фігурують у спогадах як сила закулісна та сила виконавця. Велика Британія, на відміну від Франції, прямо не сприяла зростанню військової міці Росії. Розглянуті нами особові джерела – спогади французьких та англійських політиків і дипломатів, виявлення того факту, що Росія першою з великих європейських країн розпочала військову мобілізацію й створила реальну загрозу війни проти Австро-Угорщини та Німеччини, спонукають уважніше поставитись до німецької версії подій. Зрештою, Німеччина обрала усталену практику оголошення війни країнам, які їй загрожували, задля легітимного початку мобілізації у відповідь на російські мобілізаційні заходи. При цьому, як ми могли пересвідчитись, британські політики визнавали миролюбність або, принаймні, неагресивність настроїв у Берліні напередодні спалаху війни.

Ключові слова: Перша світова війна, винуватці, Німецька імперія, Австро-Угорська імперія, Росія, Франція, Англія, мемуари, історичні таблиці, статистичні дані.

Problem Statement. As a result of the victory of the Entente countries in World War I, a one-sided view of the perpetrators of this bloody confrontation was formed. The Paris Peace Conference of 1919 – 1920 recognized the German and Austro-Hungarian Empires as aggressor countries. However, at the beginning of the Great War of 1914 – 1918, in the Ukrainian historiography another version of events was formulated. In the publications of the “Soiuz vyzvolennia Ukrainy” (“Union for the Liberation of Ukraine”), the perpetrators of the war are the Entente countries, and Russia is called the main aggressor (Nasha platforma, 1914, pp. 1–2). The German version of the events of the beginning of World War I also differed from the Versailles concept. Based on the study of the memoirs of the last German Emperor Wilhelm II Hohenzollern, memories and writings of politicians and diplomats of Germany, England, and France, as well as analytical works by the Russian General Staff, the press of the time, published diplomatic documents and statistical data, we will try to analyze the little-known alternative arguments of the German Kaiser. The focus is on the military potential of Germany in comparison with the potential of the Entente countries. The relevant data indicate that the Great War threatened Germany with an imminent disaster. Kaiser Wilhelm's “historical tables” reveal to us a kind of prelude to the war in the context of Russia's military operations. The Russian Empire was the first major European country

to begin military mobilization, and this made war inevitable. The arguments presented in the memoirs of the former Emperor Wilhelm allow us to systematize the German version of “guilt in starting the war” and check its validity.

Review of Recent Research and Publications. The events of World War I have been interpreted one-sidedly since the defeat of Germany and the conclusion of the Treaty of Versailles on July 28, 1919. The German and Austro-Hungarian Empires were accused of starting World War I (Mirnyj dogovor, 1925). This thesis became the dominant one in world historiography. The famous author Barbara W. Tuchman in her famous work “The Guns of August” (1962) drew attention to the role of chance and fatal mistakes that led to the tragic war. This was an unusual vector for the development of our understanding of World War I. War is a kind of *fatum*, a tragic set of circumstances (Barbara W. Tuchman, 1962). In Russian revolutionary and Soviet historiography, World War I was interpreted as an imperialist war, and all of its main participants were guilty of unleashing it. At the same time, the distinct aggressiveness of Germany and the sacrifices of Russia, which was forced to follow the instructions of France and suffered great human losses in the war, were emphasized. The novelty was in highlighting the hidden aspects of the Franco-Russian alliance (Lenin, 1924; Pavlovich, 1923; Pokrovskij, 1925; Tarle, 1924). Some contemporary Ukrainian studies also show the influence of the old concept of “Austro-German guilt” (Lytvyn, 2014; Trojan, 2014). At the same time, the German version of the events on the eve of World War I was supported by the Ukrainian intellectuals, founders of the “Union for the Liberation of Ukraine” in the midst of hostilities (Do hromadskoi dumky Yevropy, 1914; Nasha platforma, 1914; Znachinnie Ukrainy, 1916). In French historiography an example of the rethinking of the prevailing Versailles narratives is Jean-Jacques Becker’s article on the falsification of some documents from the French diplomatic collection *La Livre Jaune* (1914) (Jean-Jacques Becker, 2012). This was done in order to find evidence of Germany’s accusation of starting the war. In contemporary Ukrainian historiography, there is also an attempt to go beyond the Versailles univectorality. S. Vidniansky and A. Martynov draw attention to the role of different European countries in allowing the war to happen (Vidnianskyi, & Martynov, 2024). Another area of research is the study of the confrontation between the leading countries for influence in the Balkans, as this was the catalyst for the Great War (Mashevskiy, & Kondratenko, 2022; Mashevskiy, & Kupchyk, 2022).

Purpose of the study: to comprehensively study, systematize, and summarize the components of the German and Ukrainian versions (publications of the “Soiuz vyzvolennia Ukrainy” and other Ukrainian formations) of the causes and initiators of the outbreak of World War I on the basis of source documents and historiographical heritage.

Results of the Research. In 1922, the memoirs of the last Emperor of the German Empire, Wilhelm II Hohenzollern (1859 – 1941) “Ereignisse und Gestalten aus den Jaren 1878 – 1918” (“Events and personalities during 1878 – 1918”) were published in Leipzig. The memoirs became the main alternative to the prevailing Versailles concept of determining the perpetrators of World War I and at the same time became an important historical document of the era of confrontation between the old dynastic monarchies. Wilhelm II dedicated his work to his late wife Auguste Viktoria von Schleswig-Holstein-Sonderburg-Augustenburg (1858 – 1921). At the beginning of his memoirs he noted – “in memory of the Empress, at whose suggestion these notes were created” (Kaiser Wilhelm II, 1922).

The pages of this book reveal the historical drama of German history during World War I. Germany was defeated in the war, but not as a result of a military disaster, but as a result of

the outbreak of the revolution. Kaiser Wilhelm refused to suppress the rebel mass in the rear with an army loyal to him, accepted defeat, abdicated, left for the Netherlands, where he lived in the Doorn estate in the Utrecht province. Based on the text, the memoirs were an attempt to reveal the most important and most painful issue for him – to show Germany's innocence in inciting war, disinterest in waging a great war, because Germany had great success due to the peaceful development of the last decades of the 19th – early 20th centuries. At the same time, the Treaty of Versailles provided for the recognition of those countries that declared war guilty of inciting war. That is, Austria-Hungary and Germany were found guilty (Do hromadskoi dumky Yevropy, 1914, p. 2). Wilhelm strongly denied this conclusion. In his work, he tried to show “what” or “who” forced Germany to declare the war. This step was forced under deliberately created circumstances.

In general, on the eve of the Great War, European countries were aware of the power of the German army. Even the British, who at the time represented the most powerful Empire in the world, were convinced of Germany's military superiority in continental Europe. The British Prime Minister Lloyd George (1863 – 1945, Minister of Finance at the beginning of the war, Prime Minister from 1916 to 1922) recalled that two or three years before the war he had met with the Sirdar (Commander-in-Chief) of the Egyptian army, Lord Herbert Kitchener (1850 – 1916). The military commander was very skeptical of the French army and emphasized that the Germans would “shoot them like woodcock” (War Memoirs, 1938, vol. 1, p. 38). However, this was a superficial opinion. The statistics presented in 1915 by the famous economist M. Tugan-Baranovsky and later by the Soviet Institute of World Economy (Institute of World Economy and World Economy) (the 1930s) on the military potential of the German Empire and its allies during World War I showed that the Central Powers were seriously lagging behind the Entente and that they could not win a long war.

On the one hand, Germany was indeed very successful in the field of economic development. On the eve of World War I (1913), the country's share in the volume of industrial output was 15.7% of world indicators (the share of England – 14%, France – 6.4%, USA – 35.8%). In terms of the volume of major products, Germany also ranked first in Europe, second only to the United States in the world economy. For example, Germany produced 19.3 million tons of pig iron, 18.3 million tons of steel (England – 10.2 and 7.6 million tons, respectively; France – 5.2 and 4.6 million tons; Russia – 4.6 and 4.4 million tons). The United States produced 30.9 million tons of pig iron and 31.3 million tons of steel per year¹. However, on the eve of World War I, Germany and Austria-Hungary were significantly inferior to the Entente countries in the number of peacetime armies. In peacetime the French army numbered 766 thousand soldiers, the Russian – 1 million 360 thousand, the British – 258 thousand soldiers. Total – 2 million 384 thousand military. The German Army in peacetime was 801 thousand soldiers, the Army of Austria-Hungary – 436 thousand soldiers. Total – 1 million 237 thousand military. On 1 January 1915, after mobilization measures and five months of intense maneuver warfare, the French army numbered 3 million 381 thousand soldiers, Russia – 6 million 600 thousand, Britain – 1 million 500 thousand, total of 11 million 481 thousand military. At that time the German Army consisted of 4 million 200 thousand soldiers, Austria-Hungary – 2 million 500 thousand, total of 6 million 700 thousand soldiers. The largest gap in the size of the army occurred in early 1917. At that time, the troops of all Allies of the Entente were 23 million 500 thousand soldiers, of whom Russia 10 million 800 thousand soldiers, France – 4 million 511

¹ On the impact of uneven economic development of countries on international relations, see the article Zemzulina, & Tsybal, 2020, pp. 54–64.

thousand souls, England about 3 million. The German Army is about 4 million. 500 thousand soldiers, the army of Austria-Hungary – about 4 million military. Together, the troops of Germany and the Allies in January of 1917 numbered 10 million soldiers and officers. Ended the war with the indicators: the armies of the Entente (consisting of France, Britain, Italy, USA and others without Russia) amounted to 14 million 500 thousand troops, the armies of the former Triple Alliance (consisting of Germany, Austria-Hungary, Turkey and Bulgaria) – 10 million military (Tablica 2, 1934, p. 13).

In 1914 – 1918 the armament of the main participants of World War I on the European continent was as follows: artillery systems (light and heavy together, without anti-aircraft guns) – France (4800 at the beginning and 17 500 at the end of the war), Russia (7907 at the beginning and 9825 at the end), England (2000 and 11 000 respectively), Germany (7500 at the beginning and 25 000 at the end of the war); machine guns – Germany significantly prevailed in light machine guns – 12 000 at the beginning of the war, 104 000 at the end (France had 70 000 at the end of the war, England 10 000, Russia had none by the end of the war), but Germany had no heavy machine guns by the end of the war (respectively, France had 5000 at the beginning of the war, 30 000 at the end of the war, Russia had 4152 at the beginning, at the end – unknown, England – 2000 at the beginning, 50 000 at the end); tanks – at the beginning of the war, no country had them in service, at the end – France 4000, England 3000, Germany 70, Russia had none; fighter aircraft – France 560 at the beginning, 7000 at the end of the war, Russia 150 at the beginning, 1000 at the end of the war, England 272 and 4000 respectively. Italy, which had been fighting on the side of the Entente since May of 1915, had a large Air Force: 14 airplanes at the beginning of the war and 2600 at the end of the war. Germany had 300 aircraft at the beginning and 14 000 at the end of the war (Table 18, 1934, p. 31).

In terms of the parameters of the German Navy, although it was actively building it during the reign of Wilhelm II, at the beginning of World War I it was far inferior to the navies of the Entente countries, especially Britain, and could not counteract their military power at sea. In 1914 Great Britain had 460 warships (battleships, cruisers of various types and destroyers) and 105 submarines, France – 116 ships and 69 submarines, a strong Navy owned by Italy (since May of 1915 on the side of the Entente) – 164 warships and 49 submarine, Russia was not part of the “major maritime powers”, Germany had 267 warships (dominated by destroyers) and 26 submarines (Calculated by: Tablica 49, 1934, p. 50).

Germany’s lagging behind in terms of military potential, including naval capabilities, had large-scale consequences a year after the outbreak of the war. M. Tugan-Baranovsky noted that German maritime trade came to a standstill. The international exchange of the German Empire declined under the influence of the war to 1/10 of its previous size. Germany turned into an “isolated trading state” (Tugan-Baranovsky, 1915, pp. 274–275).

These statistics show the validity of Emperor Wilhelm’s statement about the obvious disadvantage for Germany to start a war in 1914, given the combined forces and the numerical superiority of the potential enemy (Kaiser Wilhelm II, 1922, p. 255).

The testimonies of British diplomats on the eve of the war confirmed Germany’s peaceful intentions, and in this regard, the British Foreign Office even maintained reasons for optimism. Of all the Entente countries, Britain pursued the most cautious policy and apparently did not “work” to incite war. The British Ambassador to France, Lord Francis Leveson Bertie (1844 – 1919), wrote in his Diary (1924, the Russian translation published in 1927 entitled “Behind the Scenes of the Entente”) on 27 July 1914 he wrote that despite the

strong intentions of the so-called “military party” in Germany, he did not consider “that the German Emperor and his Government desire war”. “But if the Russian Emperor adheres to the absurd and outdated claim that Russia is the protector of all Slavic States, no matter how badly they behave, war is likely” (The Diary of Lord Bertie of Thame, 1924, p. 2).

Lord Bertie was inclined to the opinion of the Prime Minister of the United Kingdom Herbert Henry Asquith (1852 – 1928, Prime Minister 1908 – 1916), who believed that the situation depended on Russia’s position. The entry in the 29 July Diary is very eloquent: “Things look more hopeful as regards peace between the Powers. The Russians and Austrians are to converse. If, however, the Russians begin to mobilize the Germans will do the same – and then?” (The Diary of Lord Bertie of Thame, 1924, p. 4). In the end, this is what happened, military mobilization in Russia led to a declaration of war and the beginning of a world fire.

The key aspect of preparing for war, of course, was the military action of certain countries. The event that made the beginning of the war inevitable was the mobilization of Russian troops and the corresponding direct threat to the bloc of Central Powers, especially to the weaker military power of Austria-Hungary. Before the war, the Russian army outnumbered the Austro-Hungarian army three times; numbering 1 360 000 against 436 000 (see statistics above). After the assassination on 28 June 1914 in Sarajevo of the heir to the Austrian throne, Franz Ferdinand, Archduke of Austria-Este (1863 – 1914), and his wife, Sophia, Duchess von Hohenberg (1868 – 1914), events unfolded without an alternative to the Austro-Hungarian Empire. Representatives of Austria-Hungary were prohibited from investigating the case in Serbia, where the participants in the murder, armed with Brauning revolvers (most likely, it was a compact Belgian revolver le Nacional for 7.65x17 cartridges) and six hand grenades, arrived (Prilozhenie 8, 1915, pp. 72, 74–75).

In response, the Austro-Hungarian Empire declared war on the Kingdom of Serbia on 15 July 1914 and mobilized eight corps (about 400 000 troops). Of these, four corps (two armies – about 200 000 soldiers) took part in the military operation against Serbia – led an offensive from the north and northeast on the territory of Serbia. The other four corps reinforced the eastern direction in the face of a possible war with Russia (Shol’p, 1914, p. 1; Vojna, 1914, p. 1). Despite the fact that this local mobilization did not pose a threat to Russia in terms of possible offensive operations by Austria-Hungary, and the Russian Army still far outnumbered the Austro-Hungarian Army (1 360 000 against more than 830 000 Austrian troops after local mobilization, of which 200 000 were used against Serbia – Author), Russia began the so-called “limited mobilization” on July 16, 1914. As a result, mobilization was carried out in the Odesa, Kyiv, Moscow, St. Petersburg (primarily reserve military ranks of the Navy), Kazan military districts. The Cossacks of the Don, Kuban, Terek, Astrakhan, Orenburg, and Ural armies were mobilized. Finally, reserve officers of the army, navy, Cossack units, doctors, veterinarians and pharmacists were mobilized in all twelve military districts of the Russian Empire. In those districts where the mobilization of lower military ranks took place, there was also a supply of horses, carts, and harnesses from the population to the Army (Vysochajshyj ukaz., 1914, p. 1).

The scale of this “limited mobilization”, along with the huge army of 1 360 000 peacetime troops, revealed a direct military threat to Germany and a mortal threat to Austria-Hungary – all of Ukraine east of the Zbruch as part of the Russian Empire was to be mobilized! On 18 July Russia announced a general mobilization. The result of this decision by Russia, which was militarily commensurate with the declaration of war, was the open declaration of war by the German Empire and the corresponding launch of the army’s own mobilization

mechanism on July 19 (August 1 according to the new style) – only on the third day after Russia’s large-scale mobilization measures! In addition, as noted in 1916 by General of the Cavalry, Baron Konstantin Wilhelm von Gebsattel (1854 – 1932) – before the war continued covert measures of the Russian Army to concentrate troops against the Central Powers. “Russia has skilfully prepared everything to destroy Germany”, wrote the German general. “Under cover of manoeuvres, in April 1914, it threw its masses of troops to the western borders” (Znachinnie Ukrainy, 1916, p. 291).

In the memoirs and correspondence of the German Emperor, we find this interpretation – the reception of Russian mobilization as the engine of the Great War (Kaiser Wilhelm II, 1922, p. 216). On 17 and 18 July, Kaiser Wilhelm II sent warning telegrams to Russian Emperor Nicholas II, emphasizing the inevitability of war because of Russia’s mobilization measures. The same warnings were passed on through the German Ambassador to St. Petersburg (Germanskaya Belaya kniga, 1915, pp. 60–61). In response, the Russian Tsar allegedly gave a verbal order to the Chief of the General Staff, Nikolai Yanushkevich (1868 – 1918), to stop the mobilization. However, this was not done, and Russian supporters of the war no longer held back – the military mechanism was launched. Personally, with regard to the main perpetrators of the war, William II named French President Raymond Poincaré (1860 – 1934), Russian Foreign Minister Sergei Sazonov and Russian Ambassador to France Alexander Izvolsky (1856 – 1919, Minister of Foreign Affairs 1906 – 1910, Ambassador to France 1910 – 1917) (Kaiser Wilhelm II, 1922, pp. 218–219).

Information about Russia’s military preparations for a major war, namely the concentration of troops in the western military districts of the Empire, also applied to the earlier period. Wilhelm II noted that prisoners of war of the Siberian Corps at the beginning of the war testified that in the summer of 1913 they were sent by rail to the suburbs of Moscow for military manoeuvres. The manoeuvres did not take place, but the troops were kept at a new place and quartered for the winter. In the summer of 1914, they were transferred from Moscow to the Vilno district (Vilnius – Author) also under the guise of conducting military exercises. Soon, they were given ammunition and informed of the start of the war. The Siberian Corps took part in the Russian offensive in East Prussia (Kaiser Wilhelm II, 1922, p. 215).

According to a story published in the press in the winter of 1914/1915 by a traveling American who was in the Caucasus in May 1914, there was a large movement of Russian troops in the Caucasus. Authorities in Tiflis (Tbilisi – Author) explained this as conducting ordinary military manoeuvres. At the same time, there were great difficulties with the departure of the American and his wife. The steamships leaving the sea from the ports of the Caucasus were overcrowded with soldiers, and Russian officers explained that the troops were being sent to Odesa for large-scale manoeuvres in Ukraine (Kaiser Wilhelm II, 1922, pp. 215–216).

Thus, according to information established after the war, in addition to the mobilization of military districts of the European part of Russia in July of 1914, at least during the period of 1913 – 1914 there was a strengthening of the Russian troops near the borders with the German and Austro-Hungarian empires. At the same time, with regard to the Siberian Corps, subsequent events clearly showed that its gradual redeployment to the border with Germany was caused by the preparation of offensive actions.

For its part, a clear manifestation of Russia’s aggressive intentions against Germany and Austria-Hungary on the eve of the war was the extraordinary intensification of espionage activities in Austria-Hungary (against this country planned the largest offensive of the Russian

Army at the beginning of the war). Thus, at the beginning of 1913, there were about forty cases in the courts of the Danube Empire against people accused of espionage in favour of the Russian Empire. These were people of various social classes, citizens of Russia and Austria-Hungary, people of various civilian professions, and priests. Also in early 1913, a pre-trial investigation was conducted in Austria-Hungary against twelve people with the same charges (O shpionstve, 1913, p. 27).

In the same list of manifestations of the Russian Empire's offensive preparations in Galicia and East Prussia was the organization by the Russian General Staff of special studies on military statistics, military geography, and the comprehensive characterization of the German and Austro-Hungarian armed forces. This training had been carried out at least since the beginning of the 20th century in combination with special intelligence activities. Its results were military works with special limited access for use: "Military Geographical Description of Galicia" (1904, published by the Headquarters of the Kiev Military District), "The Armed Forces of Austria-Hungary: Organization, Mobilization and Composition of the Armed Forces (as of January 1, 1912)" (1912, published by the Main Directorate of the Russian General Staff (Quartermaster Generals Department)), "Germany. Military Statistical Description. East Prussian District" (1912, published by the Main Directorate of the Russian General Staff (Quartermaster General's Department)), "German Armed Forces" (1914, published by the General Directorate of the Russian General Staff (Quartermaster General's Department) (Voenno-Geograficheskoe opisanie, 1904; Vooruzhenny'e sily' Avstro-Vengrii, 1912; Germaniya, 1912; Vooruzhenny'e sily' Germanii, 1914).

The clear coherence between France and Russia can be seen in President Poincaré's visit to Russia a week before World War I, on 20–23 July 1914. Poincaré arrived in Russia by sea on the cruiser "France", and talks with Nicholas II took place on the Emperor's yacht at the Kronstadt raid, as well as in Peterhof, St. Petersburg and on the French cruiser before the French delegation left for home. According to President Raymond Poincaré, the tensions between Sweden and Russia over espionage efforts in the Scandinavian country under the auspices of the Russian naval attaché were discussed. They also noted the uncertainty in the issue of Austrian-Serbian relations, Nicholas II and Poincaré stressed the need for concerted action between the countries, as well as in relations with Britain (Puankare, 1925, pp. 188–196). Apparently, the real purpose of the visit to Russia was hidden, as the usual confirmation of the need for concerted action did not require a "sea voyage" of the President of France. After all, this was the period after the assassination of Archduke Franz Ferdinand, the beginning of Russia's so-called "limited mobilization" and the bringing to full combat readiness of the Russian troops in Kiev military district on the border with Austria-Hungary. At the same time, Poincaré was to testify publicly to the peaceful sentiments of both countries. At the same time, Poincaré was to testify publicly to the peaceful sentiments of both countries. In his memoirs, he quoted from his own toast during a joint dinner at the Peterhof Palace on 21 July: "France will defend, in close and daily cooperation with its ally, the interests of peace and civilization, for which both governments and both nations continue to work" (Puankare, 1925, p. 192). This diplomatic rhetoric of the President of France was once aptly interpreted by the soviet researcher M. Pavlovich in the preface to the publication of the memoirs of the French Ambassador to Russia during World War I Maurice Palaeologus (Fr. Georges Maurice Paléologue, 1859 – 1944). Assessing Poincaré's visit, he noted: "The mobilization of the thirteen corps of the Russian army and the rest of the military measures that provoked the war were developed and approved in advance by Poincaré" (Pavlovich,

1923, p. 8). In this sense, the French leader's visit to Russia really seemed justified and necessary to coordinate specific actions of the two allies.

Given Russia's "pre-emptive" military mobilization on a scale sufficient to conduct offensive operations against neighboring Austria-Hungary or Germany, we can speak of Russia's major role in the immediate outbreak of World War I. What new can be said about Russia's interest in waging a war of conquest, especially against the weaker Austro-Hungarian Empire? In this regard, the arguments of Russia's opponents in Bulgaria, which opposed pro-Russian Serbia and Russia itself in South Slavic Europe, were very interesting. Let us dwell on this briefly.

Bulgaria, which joined the Central Powers during World War I, was already one of the centres of the struggle against Russian propaganda at the beginning of the war. According to the definition of the Russians themselves, in particular in the publication "Predatel'stvo Bolgarii. Dokumental'naya istoriya Bolgaro-Serbskoj vojny' 1913 g. i vstuplenie Bolgarii v lono germanizma (1914 – 1915) (Petrograd, 1916)," Bulgarian government newspapers became a haven for "Russophobes". These newspapers were of the opinion that Russia's policy was directed against the interests and even the existence of Slavdom. Bulgarian publications emphasized that Russia had entered the war with Austria because Austria was a semi-Slavic country in which the Slavic population was more cultured than the Russian population and lived in better conditions. Austria plans to solve the Slavic problem through "trialism", granting the southern Slavs the appropriate rights and the formation of Austrian Slavism! Such a policy undermined Russian Pan Slavism and the Serbian policy of uniting the South Slavs under its leadership (there was a propaganda thesis – Serbia is Piedmont or the centre of the South Slavic revival). Thus, we can conclude that "the whole struggle (on the part of Russia and Serbia – Author) is now directed not against German pan-Germanism, but against Austrian Slavism!!!" (Veritas, & Semenova, 1916, pp. 177–178).

Based on the above, we can identify three main motives for Russia's desire to destroy Austria-Hungary as a significant European state by military means. Firstly, the Austro-Hungarian Empire was an obstacle to Russia's strengthening in the Balkans, preventing it from entering the Mediterranean region through the Aegean and Adriatic Seas with the help of Serbia (the prospect of opening up opportunities for military presence in the region and access to major sea trade routes). Secondly, the Austrian monarchy, represented by the heir to the throne, Archduke Ferdinand, was preparing plans to solve the Slavic problem in the empire by expanding the rights of the Slavic peoples, introducing the principle of "trialism" and neutralizing the Russian myth of the main defender of the Slavic peoples. The Austrian monarchy itself could claim the role of defender of the Slavic peoples and the formation of the main centre of Slavism. Thirdly, Russia intended to "finally" resolve the Ukrainian issue by occupying the western lands of Rus-Ukraine. In this way, it would end the centuries-long struggle against the true bearers of the historical heritage of Kievan Rus, by destroying the rightful heir to an ancient tradition.

Accordingly, did the behind-the-scenes organizer of World War I, namely the French Republic, have offensive plans against Germany? Raymond Poincaré gave the answer to this question in his memoirs. The President of France wrote that the mobilization, which began on 2 August 1914 (20 July in the old style), made it possible to form an Army of 3 million 780 thousand soldiers, including 77 thousand native colonial troops. This was the total number of the Army before the losses of the first months of active warfare, and it was an Army that had to wage a large-scale war on only one front. Four armies of eighteen corps and eight

reserve divisions were concentrated at the forefront between Mezier (Charleville-Mézières) and Belfort. The Fifth Army, consisting of three corps, was stationed on the second line from Sainte-Menehould to Commercy, with the prospect of being deployed at the forefront if necessary. In this case, the offensive targets defined the French Army before the war. Poincaré recalled, “The offensive had to be as fast as possible. We had to operate on both flanks, the right – in Lorraine between the forests and mountains of the Vosges and the Moselle in the direction of Toul, the left – north of the railway between Verdun and Metz. The troops connecting the two flanks, stationed in the upper Meuse and in the Vainre, were to provide communication between the armies designated for the two combined attacks; Due to this military plan, our troops had to move east and northeast” (Puankare, 1936, p. 6).

Subsequent events showed that the German army simply acted ahead of the French and forced it to defend itself. The French President put it this way in his memoirs, “While our army was going to methodically carry out its concentration (it is clear from the above that the concentration was to precede the deployment and offensive – Author), Germany, which deliberately hurried with its declarations of war (actually responded to military mobilization in Russia and acted according to the forced plan of war on two fronts – Author), is ready to begin hostilities and on 5 August at six o’clock in the evening begins the attack on Liege, which was conducted by six brigades under the command of General Otto von Emmich (1848 – 1915) and three cavalry divisions led by General Georg von der Marwitz (1856 – 1929). The total number of troops that invaded Belgium, King Albert I of Belgium (1875 – 1934) estimated at 120–150 thousand soldiers” (Puankare, 1936, p. 8).

Conclusions. In his memoirs, the former German Emperor Wilhelm II Hohenzollern presented “historical tables” that were supposed to prove the falsity of the accusations of Germany and Austria-Hungary in the outbreak of World War I. The author has shown the groundlessness of these accusations at various levels of information. The main component of reasoning is the search for logic in the desire of certain countries to start a war. In this regard, the war was the least profitable for Germany among the large countries of Europe, because this country was undergoing a phase of rapid economic growth precisely in the conditions of a long peace, and was the first economic power of Europe. Instead, the war for Germany, under the conditions of the united and overwhelming forces of the Entente, looked like a losing strategy. The analysis of the indicators of military capabilities presented in the article confirms this thesis of Wilhelm Hohenzollern and proves the impossibility of conducting a successful long-term war against the overwhelming forces of the enemy in a situation of strategic encirclement by enemy countries from the West, East and North (the overwhelming fleet of Great Britain). At the same time, not only Germany waged a war on two fronts, but also Austria-Hungary (Russia in the East and Serbia and Montenegro in the South). Wilhelm II laid the general blame for the outbreak of the war, stopping the successful peaceful development of Germany, on his opponents in the international arena. France and Russia appear as a behind-the-scenes force and an executive force. The United Kingdom, unlike France, did not directly contribute to the growth of Russia’s military power. The narrative sources examined – the memoirs of French and British politicians and diplomats, the discovery that Russia was the first major European country to begin military mobilization and create a real threat of war against Austria-Hungary and Germany – prompt us to focus more attention on the German version of events. Due to the favourable strategic position of the Entente countries, France and Russia became the main organizers of the war. At the same time, Germany and Austria-Hungary were forced to respond to terrorist and military

threats from Serbia (the assassination of the heir to the throne and commander-in-chief of the Austro-Hungarian army, Franz Ferdinand von Habsburg, and his wife, Duchess Sophia von Hohenberg), Russia, and France. Germany chose the established practice of declaring war on threatening countries in order to mobilize in response. It is significant that British politicians recognized a peaceful or at least non-aggressive mood in Berlin on the eve of the war.

The second level of argumentation is the identification of trends through a set of individual facts. In this regard, we note the importance of information on the redeployment of Russian troops in Russia's western military districts on the eve of the war, the anti-German sentiments of Grand Duke Nikolai Nikolaevich (Supreme Commander-in-Chief of the Russian Army in 1914 – 1915) and Russian officers in general. Also indicative is the leak of information about the war, which will begin “not earlier than the end of the month” (July of 1914 – Author) and will lead to the inevitable defeat of Germany and Austria-Hungary. Relevant information came from Grand Duchess Anastasia (1868 – 1935) and Militia (1866 – 1951) of Montenegro during the dinner in honour of French President Raymond Poincaré in the Red Village on 9 (22) July 1914. They referred to an encrypted telegramme from their father King of Montenegro Nikola I Petrovic-Negos (1841 – 1921) (Kaiser Wilhelm II, 1922, pp. 213–214; Paleologue, 1923, pp. 39–40).

These facts look quite convincing because the former Emperor Wilhelm offered evidence and information that came from Germany's enemies or was made public after the end of World War I (Wilhelm Hohenzollern took the above information from the memoirs of the French Ambassador to Russia Maurice Paleologue, first published in the *Revue de deux Mondes* in 1921) (Kaiser Wilhelm II, 1922, p. 213). In his “historical tables”, Kaiser Wilhelm sought to show the reader that the Great War was a planned action for Russia and France, while for Germany it was unprofitable and unexpected. That is why, he preferred to call the section of his memoirs devoted to the preparations for and the outbreak of the war “Kriegsausbruch” – “outbreak of war”.

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**FEMALE FIGURES IN THE UKRAINIAN WAR OF INDEPENDENCE 1917 – 1921
IN EXILE: WORK FOR THE FUTURE OF UKRAINE**

Abstract. *The purpose of the article is to reveal the information potential of the memoir heritage of the Ukrainian War of Independence 1917 – 1921 heroines for understanding their contribution to the Ukrainian cause abroad. Using the memories of these women, we can analyze their situation after the defeat of the Ukrainian–Soviet War, and determine exactly how they made their daily life in other countries. Also, the purpose of the article is to identify the success they achieved in the fields of their own professional activity, overcoming the difficulties of emigration. The research methodology is based on general scientific methods of analysis, synthesis, generalization. To analyze the sources of personal origin, the method of critical discourse analysis has been used. The method of sociological science, specifically biographical, has been also used. The study is based on a feminist and gender*

approach. **The scientific novelty** of the article consists in the following: for the first time there has been analyzed insufficiently studied aspect of the period of the Ukrainian War of Independence 1917 – 1921, particularly the contribution of women activists to the continuation of the Ukrainian issue in other countries. There have been found patterns, similarities and differences in the experience of female figures of the national liberation process who emigrated to different countries and continents. Based on the memoir heritage, for the first time there have been revealed and systematized the personal challenges that these women faced overseas. We have analyzed the way they overcame those complexities, what they did useful for the case of the Ukrainian state, and how they were implemented to their own professional activities. **Conclusion.** The research is a promising area of studying aspects of the Ukrainian War of Independence 1917 – 1921. The collected facts about forced moving abroad from the memoirs of women participants in the national liberation process show their varied experiences, but also common features. The research shows that women continued their activities in favour of Ukraine after the rout in the Independence War, overcoming emigration complications and hoping for the revival of the state. The analysis of their contribution to this affair and highlighting their professional activities will enrich the study of the Ukrainian national liberation process 1917 – 1921.

Key words: Ukrainian War of Independence 1917 – 1921, Soviet-Ukrainian War, women's history, emigration, Ukrainian People's Republic, Second Hetmanate, Directory, Personal Records as Historical Sources

ЖІНКИ-УЧАСНИЦІ УКРАЇНСЬКОЇ РЕВОЛЮЦІЇ 1917 – 1921 рр. В ЕМІГРАЦІЇ: ПРАЦЯ ЗАРАДИ МАЙБУТНЬОГО УКРАЇНИ

Анотація. **Мета статті** – розкрити інформаційний потенціал мемуарної спадщини героїнь Української революції 1917 – 1921 рр. для розуміння їхнього внеску в українську справу за кордоном. Використовуючи спогади цих жінок, ми можемо проаналізувати їхнє становище після поразки в українсько-радянській війні та визначити, як саме вони влаштували своє повсякденне життя в інших країнах. Також метою статті є виявлення успіхів, яких вони досягли у сферах власної професійної діяльності, долаючи труднощі еміграції. **Методологія дослідження** ґрунтується на загальнонаукових методах аналізу, синтезу, узагальнення. Для аналізу джерел особового походження використано метод критичного дискурс-аналізу. Також використано метод соціологічної науки, зокрема біографічний. Дослідження ґрунтується на феміністичному та гендерному підходах. **Наукова новизна** статті полягає у тому, що вперше проаналізовано недостатньо вивчений аспект періоду Українських визвольних змагань 1917 – 1921 рр., зокрема внесок активної частини жіноцтва у продовження української справи в інших країнах. Виявлено закономірності, подібності та відмінності у досвіді жінок-діячок національно-визвольного процесу, які емігрували до різних країн і континентів. На основі мемуарної спадщини вперше виявлено та систематизовано особистісні виклики, з якими ці жінки зіткнулися на чужині. Проаналізовано, у якій спосіб вони долали ці складнощі, що корисного зробили для справи Української держави, та як саме вони реалізувалися у власній професійній діяльності. **Висновок.** Проведене дослідження є перспективним напрямом вивчення різних аспектів визвольних змагань 1917 – 1921 рр. в Україні. Зібрані факти про вимушений переїзд за кордон зі спогадів жінок-учасниць національно-визвольних процесів свідчать про їхній різний досвід, з водночас наявними спільними рисами. Дослідження показує, що жінки продовжували свою діяльність на користь України і після поразки Української революції, долаючи еміграційні труднощі та сподіваючись на відродження держави. Аналіз їхнього внеску в цю справу та висвітлення професійної діяльності збагатить вивчення українського національно-визвольного процесу першої третини ХХ ст.

Ключові слова: Українська революція 1917 – 1921 рр., радянсько-українська війна, жіноча історія, еміграція, Українська Народна Республіка, Гетьманат, Директорія, джерела особового походження.

Problem Statement. The Ukrainian War of Independence of 1917 – 1921 was a large-scale attempt to build an independent state. These years were filled with important political and

military events, attempts by various political forces to realize the state potential of Ukraine. The Bolshevik occupation, the repressions that began shortly after the Bolsheviks came to power, against former figures of the Central Rada (revolutionary parliament of Ukraine) – all of this forced the socio-political and military figures of Ukraine to continue the work of the Ukrainian state out of the country. Among the Ukrainian political emigrants of the 20s, there were a sufficient number of women public figures, a smaller number – female former soldiers and doctors who took direct part in military operations of the Soviet-Ukrainian War. Firstly, all of them had to adapt to new conditions, integrate into foreign society, and ensure their existence. Most of them did not leave the idea of Ukrainian statehood, and at the first opportunity, women gathered in organizations, societies, published own stories, gave interviews and wrote articles for Ukrainian-language newspapers and magazines. Hence, women became a full-fledged part of the Ukrainian Diaspora, doing everything possible to ensure that the Ukrainian issue did not go into oblivion. They represented abroad an alternative, Bolshevik-free Ukrainian idea. The most striking characteristic of women's activities is their focus on the future, since former figures of the national liberation struggle did not give up hope for the revival of the Ukrainian state. To illustrate the relevance of the research, it should be mentioned that there are not many researches about women in emigration – most ignore this aspect, focusing on the general characteristics of leaders, military and political activities of the top of the Central Rada, or the following state formation of this period – The Directorate or Second Hetmanate. This kind of research should complement the existing scientific research about the Ukrainian War of Independence of 1917 – 1921.

Review of Recent Research Papers. The nature of research on this topic covers mainly general issues of the resettle process of the 20s of the 20th century. Obviously, the research comes after Ukraine gained independence and lifted the taboo on the issue of Ukrainian national liberation struggle, which was banned during the Soviet era (Piskun, 2017).

The work of scholars of the period of Ukraine's independence often concerns the leaders of national liberation processes outside Ukraine, such as Serhiy Lytvyn's article "Simon Petliura and Ukrainian Emigration. Historiography of the Problem", or the study by Jean-Bernard Diupon-Melnychenko "Public Activities of the Interwar Ukrainian Emigration in France" (Lytvyn, 2000; Diupon-Melnychenko, 1995). The research by scholars such as Ihor Sribniak, Oleksandr Kolianchuk, Volodymyr Troshchynskiyi, Valentyna Piskun focused on status issues of former Ukrainian warriors, figures from different spheres, or emigration process itself against the background of socio-political upheavals in Europe (Sribniak, 2000; Kolyanchuk, 2000; Troshchynskiyi, 1994; Piskun, 2008). An example of recent narrow-focus research can be given (Paliienko, Sribniak, & Holovanov, 2023).

As for the study of women under similar conditions, the historiography of the period of independence is represented by a much smaller number of scientific studies. Among them is Valentyna Piskun's, who researched the domestic dimension of the lives of Ukrainian emigrant women in the publication "Family Life of Ukrainian Political Emigrants: Life, Relationships (the 20s – 30s of the Twentieth Century)" (Piskun, 2017). The researcher emphasizes that while covering the problems of Ukrainian diaspora, scholars mostly focus on political and military topics, ignoring the domestic or family aspect and women's contribution to the Ukrainian issue.

At the same time, modern historians focus on the fate of the wives of military and political figures, such as Taisiia Kivshar's study, in which there is analyzed the role of Olha Petliura in the activities of Ukrainian political emigration in Europe in the 20–40s of

the 20th century (Kivshar, 2017). As is obvious from this, in the absence of a comprehensive study on this issue, there are separate biographical research of the lives of prominent members of the national liberation movement, which raise the issue of their activities overseas. This is, for example, the study by Yulia Horbach (Horbach, 2017). Also, many similar researches concern Ukrainian educator Sofia Rusova. The migratory stage of her life is the main part of Oksana Dzhus's research, in which the author not only analyzes the results of the work this public figure, but also demonstrates the challenges faced by a female activist of the post-revolutionary period (Dzhus, 2002). A researcher Olha Bezhuk proves in her work that the experience of state-building in the homeland was not in vain. After the defeat of the Independence War 1917 – 1921, it helped women organize abroad and continue their contribution to the Ukrainian issue (Bezhuk, 2006).

Some studies raise the issue of women's integration into the society of individual countries, such as Canada. This is Khrystyna Sholota's research "Self-Organization of Ukrainian Women in Canada during the First and Second Waves of Emigration (1892 – 1914, 1922 – 1939)", which provides a general description of the post-revolutionary stage of migration process to North America (Sholota, 2017).

A historian Marta Bohachevska-Khomiak touches upon the activities of women in exile. One of these works is "White on White: Women in Public Life in Ukraine 1884 – 1939", in which the author analyzes the problem of women's self-organization (Bohachevska-Khomiak, 1995). Some aspects of the issues of our research are studied by Olena Vahina in her research "Activities of Ukrainian Primary and Secondary Schools in Emigration in European Countries: 1915 – 1945" (Vahina, 2010). The activities of women in Western Ukrainian lands after the defeat of the Ukrainian army are analyzed in studies on the women's organization "Union of Ukrainian Women" with a centre in Rivne and its branches in the territory of Volyn Voivodeship (Davydiuk, & Martynchuk, 2024). Recent research raises the issue of the Sovietization of women's organizations and their participation in this process after the Soviet occupation of Western Ukrainian territories (Starodubets, & Sushyk, 2021).

Mentions of the migratory period of female participants in the national liberation movement at the beginning of the 20th century can be found in the works of historians Valentyna Borysenko, Oksana Onishchenko, Roman Koval (Borysenko, 2004; Onishchenko, 2016; Koval, 2020).

Thus, today there are no comprehensive studies on this historical problem. This is also due to the fact that, according to Oksana Kis, the methodological discussions of Western historians in the 1970s and at the beginning of the 1980s, dedicated to the women's issue, were not studied by Ukrainian historical science. Therefore, what was lost in this issue is only being made up for (Kis, 2012). We have only some references to the migratory period of the life of participants in the national liberation processes of 1917 – 1921, which are contained in general works by scholars on women in the history of Ukraine. Similar facts can be found in works and articles of a biographical nature dedicated to individual figures of the national liberation struggle 1917 – 1921. The common feature of the studies is that the authors prove that women did not stop their activities in favor of Ukraine, overcoming personal hardship of integration in a foreign environment.

The purpose of the research is to analyze an under-researched aspect of the Ukrainian national liberation struggle in 1917 – 1921, precisely the activities of women participants in the national liberation process after emigration from other countries. This research will explain us how these women realized themselves in their professions under the new

conditions, how they adapted to the new environment, and what contribution they made to the development of the Ukrainian issue despite the challenges.

Results of the Research.

The Situation of female activists in the Ukrainian War of Independence 1917 – 1921 after the defeat – forced emigration.

Our research is based on memoirs of women who participated in the national liberation struggle and were forced to emigrate after 1921. These are memoirs of participants in the events of the national liberation processes who found themselves in other countries after the suppression of the national liberation processes of 1917 – 1921. It is, first of all, the personal stories of such Ukrainian writers, journalists, public activists as Halyna Zhurba, Kateryna Antonovych, Sofia Rusova, Nadiia Surovtsova, Maria Livytska (Zhurba, 1990; Antonovych, 1973; Surovtsova, 1996; Livytska, 1972). The story of Olena Ott-Skoropadska, the daughter of Hetman Pavlo Skoropadsky, a participant in the national liberation struggle, can be found in her own entry (Skoropadsky, 1995).

As for military women, there are much fewer sources with facts about them. This is due to the difficulties of writing about them because of their risky activities, and the fate of these figures was tragic much more often since many of them were killed by the Bolsheviks (Shvydchenko, 2019). One of such rare personalities is Kharytyna Pekarchuk, a khorunzha (in the Ukrainian armed forces of the army of the Ukrainian People's Republic, it corresponded to the rank of lieutenant) of the army of the Ukrainian People's Republic (Pekarchuk, 1969). There is note of Tetiana Mykhailivska-Tsymbal, a teacher and intelligence officer in the troops of the Ukrainian People's Republic. Her memoirs are especially valuable in the sense that they relate to the activist's adaptation in Argentina, a country to which the Ukrainians emigrated less frequently (Mykhailivska-Tsymbal, 1977; Mykhailivska-Tsymbal, 1984).

Consequently, this period in the lives of women who participated in the national liberation struggle of 1917 – 1921 is mentioned in notes written by themselves, which were published abroad as articles in the Ukrainian-language magazines. It was only possible to publish such publication out of Soviet Ukraine. In the Soviet Union, this was impossible because of censorship. Women's memoirs contain much more reflection, evaluation of their own reactions to historical events. Considerable attention women paid to the others (Kis, 2014).

The end of World War I, the events of 1917 – 1921, were a great upheaval for Ukraine. The attempt to establish itself as an independent state failed, despite the military and diplomatic efforts of various Ukrainian political forces (Reient, 1994, p. 30). Political emigrants left the representation of the Ukrainian People's Republic and West Ukrainian People's Republic in the countries to which they emigrated. The status of the emigrants and household problems were the most general problems they faced (Karaulov, & Babenko, 2021). We can see many points in common in these lives stories: despair at the need to leave the work in which they had invested so much effort, and at the same time hope for a return. We see both of these emotions in the autobiography of Halyna Zhurba, a writer and activist. In her work entitled "From the Ukrainian House to the Muzaget", she narrated her impressions of Kyiv in 1920, which "did not resemble the brilliant, magnificent city that I found in 1912... the despoiled and terrorized Kyiv made a depressing and miserable impression". The atmosphere at Halyna's workplace – publishing house "Vsevydat" became increasingly tense, and the Red Terror began. Halyna Zhurba came under suspicion and was forced to leave Kyiv. "The time has come when a person is most afraid of a person, distrusts, and avoids them", Halyna wrote. Leaving Kyiv, the writer depicted her state of confusion, not knowing what stuff to take with

her, as she hopes to return soon. “And yet... in a month, maybe we will return. Maybe in two” – she wrote. This entry in her notes becomes even more dramatic because she is leaving Kyiv forever. Therefore, in her life story, we can trace a hard transition from the elation of 1917 to the difficult events of 1920, when, under the pressure of the Bolshevik invasion, the woman was forced to leave her homeland (Zhurba, 1990).

For delving into this phenomenon, we should turn to Tamara Petriv’s memoirs. The wife of the General of the West Ukrainian People’s Republic’s Army, was in the evacuation train of the Supreme Commander (Symon Petliura) in 1920. She described a general feeling of hopelessness and longing for her relatives who remained in Ukraine (Petriv, 1960).

Ukrainian teacher Kateryna Antonovych devoted two whole chapters of autobiography to her experiences on the eve of moving abroad. Kateryna went to visit her husband in Prague, who had been forced to leave Ukraine earlier. Her notes contain useful information about the complexities of leaving with her children, obtaining a passport to leave Soviet Ukraine in 1923, and her fears about crossing the border (Antonovych, 1973, pp. 219–222).

We find detailed recollections of the evacuation day in the work “My Memories” by Sofia Rusova, a prominent Ukrainian educator who worked in the Ukrainian Central Rada. With the Bolsheviks’ advance, Sofia marked that they personally treated her well, but she still decided to leave, given the prevailing atmosphere of suspicion, distrust, and the beginning of arbitrary arrests and executions. Sofia Rusova did not hesitate, she made a firm decision, especially after the outrageous fact that instead of science, professors were supposed to “manage vegetable gardens to help Moscow’s ‘comrades’”. The famine of 1922 – 1923 was approaching the territory of Ukraine, and Sofia Rusova moved out at a particularly dark time for her homeland (Rusova, 1937, pp. 254–280).

We see a slightly different character of the process of moving abroad in the case of Nadiia Surovtsova. She left country after the Directorate of Ukraine came to power in 1918 and joined the diplomatic mission to the Paris Peace Conference. Surovtsova lived through all of the subsequent events, including the Bolshevik occupation, while was in Europe. With plans to study in Vienna, Nadiia certainly did not intend to leave Ukraine forever, and she left in elation, unaware of the events that would follow. There are her vivid remarks about this: “It was unclear what would remain behind us in Kyiv, and even less clear what awaited us in Paris. One thing we can say now, forty years later, is that none of us expected to leave our homeland for so long, and some of us even for good. Everything was measured in months, and no one had any idea about years. We did not dream about decades in our worst dreams” (Surovtsova, 1996, p. 91).

In the memoirs of Mariia Livytska, a writer and wife of the exiled president of the Ukrainian People’s Republic, Andriy Livytsky, we see experiences on the eve of the revolution’s rout, similar to those we have already read about in the stories of previous figures. There is excitement, dejection, and the need to make hard decisions. Traveling west to Poland on an evacuation train, Maria is full of hope, and marked: “We are not leaving Ukraine for long, Ukraine will be an independent state, and we will definitely return”. Maria would not return to the territory of Ukraine, but she would not stop working for the Ukrainian statehood (Livytska, 1972, pp. 342–343).

The memories of the relatives of the participant in the national liberation struggle, Hetman Pavlo Skoropadsky arouse interest as well. Two of the hetman’s daughters, Olena Ott-Skoropadska and Yelyzaveta Kuzhym-Skoropadska, characterized their lives under the new conditions. According to Olena, the collapse of the Hetmanate was a real catastrophe

for the sisters, and although some family members came to terms with the new reality, others continued to live in the past (Skoropadskyi, 1995, p. 417).

These memories have one common characteristic: unhappiness, natural fear of the unknown, homesickness, desire to stay at home, hope for return. The second point is the hope of returning. Each of them makes a note of the temporality of events and the need to continue the struggle. We also observe distinctive remarks—some figures are full of a sense of a better future, while others are more realistic or even cautious about the future, such as Sofia Rusova or Skoropadsky's daughters. It should be noted that these publications are about women public and political figures who tried to save Ukraine by participating in governmental activities, education, and journalism in favor of the homeland.

As already noted, memoirs of emigrated women soldiers, members of underground movements, or nurses are much rarer, as their activities were more dangerous, and they wrote their notes on the condition of successful departure. This was more complicatedly for them to realize due to direct participation in hostilities. One of the female soldiers, Kharytyna Pekarchuk. The peculiarity of the women's memories is that the process of emigration often took place in their case without the opportunity to be aware of what was happening or to pack their belongings. In Kharytyna's example, we can see that she left the war zone directly from the fighting, under pressure from the Bolsheviks, and went to Poland with the military force. "We were not captured, but interned", the author noticed. Her morale is shattered at this point: "We celebrated our first Easter outside our native land there. It was very sad. Our situation was hopeless, our mood was heavy and depressed. We had long since forgotten about the possibilities, and now we had also lost our freedom of movement and the opportunity to be active. And at that time, Ukraine was being bloodied..." (Pekarchuk, 1969).

A similar sentiment can be seen in the memoirs of Tetiana Mykhailivska-Tsymbal, a scout and a soldier. "Every day, victims fell under the Bolshevik hammer and sickle", she wrote. However, like the public figures mentioned above, Tetiana hopes for a quick return and cannot accept the need to leave her native land – "however, we consoled ourselves with the thought that this separation would not be long, that another revolution would come again and we would return". (Mykhailivska-Tsymbal, 1977, p. 127). The soldier and medic Khrystyna Sushko left no memories, but there are her comrades' memories on the evacuation day to Poland, Khrystyna did not stop rescuing Ukrainian soldiers, and all – her thoughts were occupied with "moral pressure of great responsibility for the sick, helpless people abandoned to her" (Sribniak, 2018).

The situation before the exit of another activist, Teresa Almazova, the wife of the Ukrainian People's Republic general who worked as a nurse, was directly related to the Separate Mounted Mountain Rifle Division of Colonel Oleksa Almazov, which was interned in Poland. As a German, Teresa did not position herself as a Ukrainian activist, but she did her best to be useful to the Ukrainian liberation movement, which she repeatedly emphasized (Koval, 2020).

Thus, although memoirs are more common among public and political figures, and the majority of women soldiers and doctors did not leave their own records, we can learn about their activities from the works of their concerned contemporaries. The historian Ruslan Pyrih points out the reasons for this: intense political, state, and military activity, the speed of events, and lack of time prevented them from recording what was happening around them (Pyrih, 2011). Therefore, among the commonalities in the situation of women who served the Ukrainian cause on the eve of the forced emigration is a sense of desperation at having

to leave their native land, as well as the leitmotif of hoping to return home in the near future. Among the distinctive features, we observe that women who fought at the fronts against the Bolsheviks of came out of Ukraine without any moral or household preparation as part of the retreating armed force. The majority emigrated forcibly due to the threat to their lives or disagreement with Bolshevik policy. This led to further foreign complexity of a psychological nature, as adaptation was much more challenging for these women than it would have been under more favourable conditions.

Overcoming emigration difficulties.

One of the tragedies that befell women was that they lived mainly with the “memories”, which, although they accumulated in works and articles, increased their despondency. Of course, it was impossible to take up the Ukrainian cause right away – the majority of women who emigrated had to deal with documents, housing, family, children, work, and status. All of this varied from country to country. Tracing the fate of female revolutionaries, we can observe that the majority of them initially went to the nearest European countries such as Poland, the Czech Republic, Austria, and Romania. Many were interned in Poland, not only former soldiers of the Ukrainian People’s Republic, but also women, who were often the wives of interned troopers. Often, those women did not stay in these countries and ended up in more distant countries such as the United States, Canada, and Argentina. It was especially common during World War II. It should also be noted that the migratory period of this female figures covers the 1920s and 1930s, when postwar Europe suffered from economic crisis and inflation. Apparently, this socio-economic situation in European countries affected both the material and moral situation of emigrant women. This is confirmed in Halyna Zhurba’s story: first, this person settled in Warsaw, and then, in her late years, she found herself in the United States, suffering from the events of World War II. From her record, we understand that the writer did not live a rich life, focusing all efforts on her writing. In the United States, “in a modest apartment above the “Bazaar” book and souvenir shop, the old writer lived out her days” (Zhurba, 1990).

Another figure, Kateryna Antonovych, devoted several pages to domestic problems at the initial stage of emigration, self-identification among the new Czech culture, and her impressions of Prague. Kateryna narrated about a problematic search of an apartment for herself and her children. Her focus was on the canteen organized by the Ukrainian Women’s Union. The author elaborated on the cultural life of the Czech Republic, where the newly arrived Ukrainian emigrants organically merged. Kateryna Antonovych’s fate was somewhat similar to Halyna Zhurba’s: in 1949, she left for North America, but specifically Canada. Kateryna Antonovych mentions labour-intensive conditions for newcomers, and the conduct of scientific and educational work for little or no pay (Antonovych, 1973, pp. 224–240).

Tamara Petriv’s fate also led her to the Czech Republic, where she received an education as an engineer-economist, although she also lived poorly, supporting herself with small earnings. The Petriv family later moved to Carpathian Ukraine – an autonomous region within the Second Czechoslovak Republic, where her husband worked as a teacher at a gymnasium. Under German occupation, she worked in a tailor shop (Lipovetsky, 1969, pp. 18–20).

Sofia Rusova mentioned many emigrant problems, from domestic problems to homesickness, which sometimes even resulted in suicide (Rusova, 1937, p. 271). She also described the prevailing atmosphere of despair and demoralization, despite attempts to regulate scientific and cultural life in favor of Ukraine. From her notes, we conclude that the problematic domestic issues of emigrant life made her work in favor of Ukraine less

productive (Rusova, 1937, p. 272).

Similar sentiments can be observed in Nadiia Surovtsova's autobiography, in which she repeatedly complained about her lack of money and hard financial situation. She wrote that "it was not a sweet life in those foreign countries". Without even considering the option of emigration, soon Nadiia met Ukrainian emigrants in Switzerland who made a depressing impression on her: "That was the first time I saw emigrants... living in a foreign country all the time. And the impression was unusually heavy. Not because the once-rich woman was poor, no. Only because they were people without roots. Everything that was close and dear to them remained on the other side. And the benefits, beauty, everything good around them was not theirs, not for them, and strange" (Surovtsova, 1996, p. 96). While in Austria, Surovtsova took on various jobs. Neither teaching nor renting a building solved her constant financial problems, and eventually she started working in a private workshop producing dolls for export. "The majority of the population was poor, and there was nothing to say about the Ukrainians", Nadiia made a note about the 1920s in Austria. The inconsistent earnings and inflation of the postwar period left little time for lecturing and popularizing the Ukrainian issue (Surovtsova, 1996, pp. 112–114).

No less interesting are the records of Tetiana Mykhailivska-Tsymbal: at first, while living in Romania, she wrote about her constant longing for her native Podillia. When she moved to Argentina, Tetiana reported about need to have seasonal jobs, complexity in learning Spanish, and living in severe poverty (Mykhailivska-Tsymbal, 1984, pp. 10–23).

Fate of Ukrainian female soldier Kharytyna Pekarchuk's was not easy, as she remembers about these years after emigration: "I soon had to leave my own corner and move to a home for the elderly.... and my health weakened even more". In her memoirs, she complained about her rather difficult financial situation, and the only thing that sustains her is the memories of the glorious past she had experienced (Pekarchuk, 1969). The emigrant everyday life of Khrystyna Sushko, a former military officer, is also replete with complications, including treatment after her injuries and the need for constant earnings (Sribniak, 2018).

Hence, almost all of these people are forced to either change their profession or take on part-time jobs outside of their main job. In general, we see the prevalence of restlessness and confusion among women emigrants, who suffered from their own threats and from observing the problems of their colleagues and compatriots.

Emigrant women's activities and achievements: faith in the future of Ukraine.

Despite the complex conditions of emigration, women tried to continue to act in favor of Ukraine, to be involved in the cultural and educational sphere, and to organize themselves into women's unions, trying to make their activities more productive. We have many examples of women's successful achievements both in their own careers and for the benefit of Ukraine. For example, Halyna Zhurba's writing talent only intensified under complex conditions. She wrote many works out of home, leaving behind a large body of Ukrainian literature created outside of Ukraine which was occupied by the Bolsheviks. The activist constantly thought about her homeland, dedicated her works to it: in publication "The Distant World" she depicted the image of pre-revolutionary Ukraine, which fought for its own place in the international arena. In her works and stories, the writer returned to her native land again and again (Zhurba, 1990). Halyna Zhurba joined the organizational activities of the diaspora, in particular the creation of the Ukrainian Writers' Association in Exile "Slovo" in 1954. Halyna had a connection with the creation of the organization and was active member, but also raised funds for the first publication. Already in the first collection of the Ukrainian Writers'

Association, Halyna published her memoirs about literary Kyiv during the revolutionary period (Tarnavsky, 1974).

Tamara Petriv's biography is equally productive. After emigration and solving domestic problems, the Petriv family tried to join in the attempts to maintain the representation of the Ukrainian government abroad. In the city of Augsburg, where the Ukrainian People's Republic government was located, Tamara Petriv became the secretary of the Ukrainian National-State Union, where she devoted all her experience and knowledge to the issue of preserving Ukrainian statehood. Similar to Halyna Zhurba, Tamara Petriv had the opportunity to prove herself at the organizational level. She joined many Ukrainian organizations, including a board member of the Union of Ukrainian Women, the Czech association "Glagol", Plastpriyat, and was the head of the "Chervona Kalyna" Youth Group (Lypovetsky, 1969, pp. 18–20). In 1950 moved to the United States, where she continued to work for the Ukrainian National-State Union (Lipovetsky, 1969).

Kateryna Antonovych's activities were even more intense: she also got involved in the organizational processes. In Prague, she was a member of the Ukrainian Women's Union, actively helped create the Museum of the Liberation Struggle, and was a chairman of the Committee of the Ukrainian Children's Shelter in the Podebrady. With her assistance, a studio of plastic art was created. In her life story Kateryna recalled that their exhibitions attracted interest not only in Ukrainian but also in Czech cultural society. Her activities in Canada after World War II were equally productive: in Winnipeg, she organized a school of drawing and painting in 1952 (Antonovych, 19773, pp. 224–240). As we can see, the activities of Petriv and Zhurba were directed either towards the literary or political field, while in the case of Kateryna Antonovych, they were focused on the pedagogical and artistic direction.

Sofia Rusova, after emigrating, actively helped the starving people of Ukraine in 1931 – 1933. She, similar to the activists mentioned above, joined organizational activities, in particular, becoming the founder of the National Council of Ukrainian Women in Prague. Taking advantage of all opportunities, she began the practice of constantly informing the European community about the situation in Ukraine (Rusova, 1937, p. 279). After the final defeat of Ukraine, most countries of the world were concerned about the victory of the Bolsheviks. At the same time, the short-term appearance on the map of Europe of an independent state of Ukraine did not give an opportunity to establish itself (Kvit, 2017). Thus, the task of the diaspora was to familiarize the world community with the Ukrainian issue. In this context, Rusova became the founder of the National Council of Ukrainian Women in Prague. Another well-known achievement of Rusova is her participation in the International Women's Congress of the League of Peace and Freedom in France. There Sofia Rusova delivered a speech in which she testified to the condition of the Ukrainian women under the Soviet occupation (Rusova, 1937, p. 279).

Thus, Sofia Rusova marked that she had little interest in women's issues because human rights were violated in the Soviet Union in general. Sofia Rusova fulfilled the request of Supreme Commander of the Ukrainian People's Army Petliura, who passed on the following words to her: "We need Rusova to travel all over Europe and tell them about the situation in Ukraine". In addition, Sofia Rusova raised money and took care of women and children who had emigrated from Soviet Ukraine (Rusova, 1937, p. 279).

Sofia Rusova spoke about Ukraine in all her speeches, introducing world organizations and the public to Ukrainian culture itself, which, in her words, foreigners often imagined as "some unknown ocean islands", or a part of Russia. This is illustrated by Sofia Rusova's

activities in Poděbrady, where she created an ethnographic exhibition of Ukrainian embroideries, photographs, and landscapes for the public to see. In addition, Sofia Rusova continued her efforts to realize an idea related to her professional activities – the creation of a higher pedagogical school for the Ukrainians (Rusova, 1937, p. 272).

Nadiia Surovtsova was able to achieve her personal career ambitions in Europe. In 1920, she graduated from the Faculty of Philosophy at the University of Vienna and defended her doctoral dissertation. She became the first woman from Ukraine to receive a doctorate in philosophy, and for some time she worked as a lecturer at the Vienna Agricultural Academy. Nadiya, similar to all above-mentioned figures, focused on international women's organizations. We should point out her participation in the Women's International League for Peace and Freedom and the Society of Progressive Journalists of Europe (Surovtsova, 1996, pp. 90–138). Here we trace the common elements of activity with Sofia Rusova. At the same time, Nadiia Surovtsova was not fully aware of the danger posed by the communist occupation. A possible reason for this difference is that Nadiia Surovtsova knew about the post-Soviet Ukraine mainly from "stories, books, newspapers, but saw nothing herself", unlike Sofia Rusova, who saw and felt all aspects of the Bolshevik occupation with her own eyes (Surovtsova, 1996, p. 157).

Participation in women's organizations is almost an obligatory page in the biography of revolutionary figures overseas. Also, we observe this in the case of Maria Livytska, who headed the Union of Ukrainian Emigrant Women in Warsaw in 1920 (Prosalova, 2012, p. 288).

As for the activities of Pavlo Skoropadskyi's daughters, they not just participated in the Hetmanate movement in exile. In particular, Olena Ott-Skoropadska, after the death of Pavlo Skoropadskyi, became a leader of this movement and recorded family history in her writings. By doing so, she contributed to sort out the phenomenon of the Hetmanate in Ukrainian history (Skoropadska, 2013). As we can see, this figure focused more on the aspect of the revolutionary period that was related to her father's activities.

The soldier Kharytyna Pekarchuk, like Antonovych and Rusova, ended up in the Czech Republic, and almost immediately began to study at the Ukrainian Economic Academy in Poděbrady. Kharytyna also took part in the work of women's organizations, including the Association of Ukrainian Women in Germany (Pekarchuk, 1969).

Tetiana Mykhailivska-Tsymbal had a particularly eventful fate, although even in the face of threats she worked in the educational sphere. In Romania she taught Ukrainian children the Ukrainian language despite the Romanian government's ban on telling children that they were not the Romanians. In Argentina, as soon as she had free time, after a hard adaptation to the new continent, she initiated the founding of the Ukrainian organization "Young Community" in Berisso, and later "Prosvita" (Mykhailivska-Tsymbal, 1984, p. 22). She remembered about staging plays based on Ukrainian works. "The youthful energy, the desire to work, and the ideology brought so recently from our homeland all added to the desire and strength to work", Tetiana recalled participating in these performances. Later, owing to Tetiana's efforts, a Ukrainian school was founded in Buenos Aires (Mykhailivska-Tsymbal, 1984, p. 46). She was also involved in the activities of the Union of Ukrainian Women. Thus, Tetyana's activities were focused on the pedagogical field and the representation of Ukraine in the political field as such. Here we can draw parallels with the activities of the aforementioned Sofia Rusova. In general, the activities of Tetiana Mykhailivska-Tsymbal are a unique example of attempts to serve the native state even so far across the ocean in South America, where the Ukrainian community was not yet well organized at the time of

her arrival.

In exile, Khrystyna Sushko, a doctor and a soldier, did not quit her professions. She conducted her own medical practice in Nice and kept in touch with other Ukrainian emigrants. During the World War II, she worked as a doctor in the camps for displaced people where the Ukrainians were held (Sribniak, 2018). Namely, unlike the female soldier Kharytyna Pekarchuk, Sushko managed to continue her professional activities and even re-engage in military struggle (Sribnyak, 2018).

Thus, the desire for self-organization, professional fulfillment, and the understanding of the need not to abandon the Ukrainian cause are the main motivations of women staying abroad, outside homeland. In the above, we can trace many common features in the work of women for the benefit of Ukraine – participation in international, literary, women's organizations; attempts to continue their professional activities and combine them with the benefit of the Ukrainian cause. At the same time, we also see the difference: the public and political figures are more hopeful than the military women. Some focused on their usual professional activities, the others delved into completely new areas for themselves. It should be added that such activities also gave their material manifestations in the form of the emergence of Ukrainian schools, museums and new Ukrainian women's organizations.

Although women put the Ukrainian issue first, they also sought their own self-realization, tried not to forget their own national identity, and helped other victims of the Soviet Union.

Conclusion. The phenomenon of Ukrainian political emigration after the rout of the Ukrainian War of Independence 1917 – 1921 is an insufficiently studied aspect of Ukrainian history. The issue of the Ukrainian women, who participated in migratory process is a less studied topic.

Some attempts have been made since independence, but there have been no comprehensive works about this process can be gleaned directly from the memoirs of female public and political figures, soldiers, and doctors. At the time of the suppression Ukrainian struggle, each of them found themselves under both similar and different conditions. They had to leave their homeland under pressure from the Bolsheviks and faced obstacles in making this decision. The main motivation for such a decision is mortal danger or a conscious choice to have nothing to do with the Soviet occupation. We have determined that on the eve of departure, each of the research subjects was overwhelmed by the same feelings: homesickness and the hope of returning home at the earliest possible moment. At the same time, we also see a difference: the public and political figures are more hopeful than the military women.

The daily lives and fates of women have much in common: hardships in adaptation and integration in a foreign country, financial burdens, and the need to work outside their specialty. Women faced obstacles in organizing even a minimal Ukrainian issue, overcoming bureaucratic and organizational problems in another country. This was compounded by the challenging interwar period in Europe, including inflation and the need to leave the country again due to the advance of Nazi Germany. As a result, many women found themselves in new conditions again and had to adapt again, mostly in North or South America. Despite this, there are many examples of their personal professional success and fruitful work for the benefit of Ukraine. Numerous Ukrainian schools in the most remote corners of the world, the preservation of Ukrainian identity and values outside the Bolshevik occupation, memories of the events of the Ukrainian War of Independence untainted by Soviet propaganda, and women's unions – all of this was fully realized by women who relied on their own strength.

A promising direction for further scientific research is the study of female emigration

peculiarities after the defeat of the Ukrainian War of Independence 1917–1921. The problem of women's everyday life in new foreign conditions needs detailed consideration.

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**THE UKRAINIAN CANADIAN COMMITTEE'S ACTIVITIES
DURING WORLD WAR II (1939 – 1945)**

Abstract. *The purpose of the research is a comprehensive analysis of the Ukrainian Canadian Committee participation (UCC) in the Canadian federal government's campaign for war efforts aimed at moral and material support for the country's armed forces and the Ukrainian servicemen present there in order to bring about victory over Nazi Germany in World War II, and its struggle with the Ukrainian Society for Aid to the Motherland (USAM) and the Assossiation of Canadian Ukrainians (ACU). The methodological basis of the study is the principles of objectivity, historicism, consistency, and problem-based approach. In the research the following methods have been used: analysis and synthesis, problem-chronological, comparative, to study the role of the UCC and ACU in Canada's war efforts, as well as the method of internal criticism of sources. The scientific novelty consists in processing of a significant number of primary sources and scientific literature, which made it possible to analyze the forms and content of the UCC's campaign in support of the Canadian federal government's course on war efforts to defeat Nazi Germany in World War II and to compare the Ukrainian Canadian Committee and the Assossiation of Ukrainian Canadians in the context of the war and the Ukrainian issue. Conclusions.* *The leadership of the Ukrainian Canadian Committee, together with its constituent and other public, youth, and cultural and educational organizations, from the moment of its founding in Winnipeg on November 6–7, 1940, conducted an agitation campaign among the youth of the Ukrainian diaspora of Canada by publishing declarations, communiqués, appeals in the press, announcing art evenings, performances, raffles and other events to collect donations for the needs of the Canadian Armed Forces, and rallied around itself all the “loyal elements” of the Ukrainian community in this country. The Ukrainian Canadian Committee supported the morale of 35,000–40,000 Ukrainian servicemen of the Canadian Armed Forces abroad, providing them with material and moral assistance. The contribution of Ukrainian Canadians and their leadership in the form of the Ukrainian Canadian Committee to the victory over Nazi Germany in World War II was highly appreciated by the AngloCanadian press, Canadian state and public figures, scientists, and all other friends of the country's Ukrainian community and its researchers. The participation of the Ukrainian Canadian Committee in the war efforts of the residence country of the Ukrainian diaspora contributed to the deep socio-political integration of the community into civilized Canadian society, instilled in*

its representatives self-confidence as full citizens at a fateful time for Canada and the world. Having held its first Congress on June 22–24, 1943 in Winnipeg, the main national patriotic representative organization of Canadian Ukrainians, countering the Soviet and Sovietophile propaganda, was able to establish itself as an authoritative body representing and defending the interests of Canadian Ukrainians before the federal government and the Canadian public.

Key words: the Ukrainian Canadian Committee, Assosiation of Ukrainian Canadians, Ukrainian Society for Aid to the Motherland, federal government of Canada, Canadian war effort, British Empire.

ДІЯЛЬНІСТЬ КОМІТЕТУ УКРАЇНЦІВ КАНАДИ В РОКИ ДРУГОЇ СВІТОВОЇ ВІЙНИ (1939 – 1945)

Метою статті є комплексний аналіз участі Комітету українців Канади (КУК) у кампанії федерального уряду Канади з воєнних зусиль, спрямованих на моральну підтримку і матеріальне забезпечення збройних сил країни і наявних там українців-військовослужбовців з метою наближення перемоги над нацистською Німеччиною у Другій світовій війні, та його боротьби з Українським товариством допомоги Батьківщині (УТДБ) і Товариством канадських українців (ТКУ). **Методологічною основою** статті послуговували принципи об'єктивності, історизму, послідовності, проблемності. У роботі використано методи: аналізу і синтезу, проблемно-хронологічний, порівняльний, для вивчення ролі КУК та ТКУ у воєнних зусиллях Канади, а також метод внутрішньої критики джерел. **Наукова новизна** полягає в опрацюванні значної кількості першоджерел та наукової літератури, завдяки чому вдалося проаналізувати форми і зміст ведення КУК агітаційної кампанії на підтримку курсу федерального уряду Канади на воєнні зусилля з метою перемоги нацистську Німеччину в Другій світовій війні, а також здійснити порівняння Комітету українців Канади та Товариства канадських українців у контексті війни й українського питання. **Висновки.** Провід Комітету українців Канади разом зі складовими й іншими громадськими, молодіжними та культурно-просвітницькими організаціями з моменту свого заснування у Вінніпегу 6–7 листопада 1940 р. проводив агітаційну кампанію серед молоді української діаспори Канади шляхом оприлюднення декларацій, комунікатів, звернень і закликів у пресі, оголошення мистецьких вечорів, вистав, розіграшів та інших заходів для збору пожертв на потреби збройних сил Канади, згуртувавши у такий спосіб навколо себе всі “лояльні елементи” української громади в цій країні. Він підтримував моральний дух 35,000–40,000 українців-військовослужбовців збройних сил Канади за кордоном, надаючи їм матеріальну та моральну допомогу. Внесок канадського українства та його проводу у вигляді Комітету українців Канади у перемогу над нацистською Німеччиною у Другій світовій війні був високо оцінений англоканадською пресою, канадськими державними і громадськими діячами, вченими та всіма іншими друзями української громади країни і її дослідниками. Участь Комітету українців Канади у воєнних зусиллях країни проживання української діаспори сприяли глибокій соціально-політичній інтеграції громади в цивілізоване канадське суспільство, вселяли її представникам як повноправним громадянам впевненість у собі у доленосний для Канади та світу час. Провівши власний перший з'їзд у Вінніпегу (22–24 червня 1943 р.), головна націонал-патріотична представницька організація канадського українства, протидіючи радянській та радянофільській пропаганді, змогла зарекомендувати себе як авторитетний орган, що представляє та захищає інтереси канадських українців перед федеральним урядом і громадськістю Канади.

Ключові слова: Комітет українців Канади, Товариство канадських українців, Українське товариство допомоги Батьківщині, федеральний уряд Канади, воєнні зусилля Канади, Британська імперія.

Problem Statement. One of the bright pages in the history of Canadian Ukrainianhood is a significant contribution of Canadian Ukrainianhood, led by its leadership – the Ukrainian Canadian Committee (since February 11, 1939 – the Ukrainian Canadian Congress) – to the victory over Nazi Germany in World War II. More than 35,000 Ukrainians fought in the ranks of the Canadian army against Nazi Germany and its satellite states, in northern

France, Belgium, the Netherlands, and Italy. The form and content of the public campaign for moral and material aid to Ukrainian servicemen of the Canadian Armed Forces, organized by the Ukrainian Canadian Committee (hereinafter referred to as the UCC) and other cultural, educational and cooperative societies and public organizations, deserve a special focus, as well as relations with the federal government of Canada and political confrontation with Ukrainian-Canadian communists members of the Ukrainian Association for Aid to the Motherland (UAAM) and the Association of Ukrainian Canadians (AUC). The results of the community's successful work to win the war were recognized by the First and Second Congresses of Ukrainians in Canada.

Review of Recent Research and Publications. The participation of the Ukrainian Canadian Committee in Canada's war effort and its confrontation with the Association of Ukrainian Canadians have been thoroughly researched by Vasyl Veryha (Veryha, 1967), Oleh Gerus (Gerus, 1982), Thomas Prymak (Prymak, 1988), Mykhailo Marunchak (Marunchak, Vol. 2, 1991) and Mykhailo Borovyk (Borovyk, 1991). The activities of the leading national and patriotic representative organization of Canadian Ukrainians during the period under study are presented in a chronological order in Olha Voytsenko's textbook study "Chronicle of Ukrainian Life in Canada" (Voytsenko, Vol. 5, 1973) and the reference publication "Ukraine: Chronicle of the 20th Century" (Ukraina: khronika XX stolittia, 2005). The contribution of Canadian Ukrainianhood to the victory over Nazi Germany in World War II was highly praised by Canadian historian Watson Kirkconnell, by citing the data from government documents and periodicals (Kirkconnell, Without year; Kirkconnell, 1940). The confrontation between the UCC and the ACU during World War II was studied by Petro Kravchuk and Anatolii Rusnachenko, Ivan Kolasky and Olena Potrebenko in the context of the history of Ukrainian communism in Canada (Kravchuk, 1959; Rusnachenko, 2016, Kn. 5; Kolasky, 1979; Potrebenko, 1977), Dmytro Kravets in the light of the history of American Ukrainianhood during World War II (Kravets, 2022), Hryhoriy Piniuta in the context of Canadian Ukrainianhood (Piniuta, 1952), Lawrence Joseph Black in the context of Canadian-Soviet relationship (Black, 1998), Leonid Leshchenko, Bohdan Kordan and Yaroslav Petryshyn in the context of the Ukrainian question, which has been repeatedly raised in diplomatic relations between Ottawa and Moscow (Leshchenko, 2001; Kordan, 2001; Petryshyn, 2011), Oleksandr Baran in the context of the UCC's founder and first President Vasyl Kushnir's socio-political activities (Baran, 1995) and Maksym Maiorov in the context of the Ukraine's fate during World War II (Maiorov, 2017). In the Ukrainian Soviet historiography this issue is mentioned in a frank negative attitude towards the UCC in the context of the Soviet-German war of 1941 – 1945 (Istoriya Ukrainkoii SSR, 1984). Piotr Eberhardt wrote about the disputes between the Polish government in exile and the Soviet Union regarding the status of Western Ukrainian and Western Belarusian lands (Eberhardt, 2006). The military and diplomatic aspects of World War II, at the beginning of which the aforementioned Ukrainian diaspora organizations were established, were studied by Stepan Vidniansky, Andriy Martynov, Valeriy Hrytsiuk, Oleksandr Lysenko, Volodymyr Kydon, Rostyslav Pyliavets, Shamil Ramazanov, and Felix Levitas (Vidnianskyi, Martynov, 2020; Hrytsiuk, Lysenko, Kydon, 2021; Lysenko, Pyliavets, 2019; Ramazanov, Levitas, 2020). A large number of primary sources on the researched issues are contained in collections of materials of the First (Pershyi Vse-Kanadiiskyyi Konhres ukrainsiv Kanady, 1943) and the Second All-Canadian Congress of Ukrainians in Canada (Druhyi Vse-Kanadiiskyyi konhres,

1946), collections of published documents of the Department of External Affairs of Canada (Kordan, 1986), Royal Canadian Mounted Police (RCMP) (RCMP Security Bulletins, 1993), Central Committee of the Communist Party of Ukraine (CC of the Communist Party of [89] Ukraine) (OUN i UPA v 1943 rotsi. Dokumenty, 2008) and Ukrainian progressive socialist Sovietophile diaspora organizations (Prophets and proletarians, 1990) about UCC's and AUC's activities, in the funds of the Central State Archive of Public Associations and Ukrainian Studies (CSAPAU), as well as in the Soviet periodical press (Tychina, 1943, p. 3).

The purpose of the article is a comprehensive analysis of the Ukrainian Canadian Committee (UCC) participation in the Canadian federal government's campaign for war efforts aimed at moral and material support for the country's armed forces and the Ukrainian servicemen present there in order to bring about victory over Nazi Germany in World War II, and its struggle with the Ukrainian Association for Aid to the Motherland (UAAM) and the Association of Ukrainian Canadians (AUC).

Results of the Research. After the outbreak of World War II, almost the entire Ukrainian national patriotic diaspora press in Canada published declarations of the Ukrainian community's devotion to this country and editorials that confirmed the resolute determination of Ukrainian Canadians in the fight against Nazi Germany. On September 5, 1939, the Brotherhood of Ukrainian Catholics's (hereinafter – BUC) headquarters issued a declaration of Ukrainian Canadians' loyalty to Canada and the British Empire and its King George VI, and the next day the Ukrainian Self-Reliance League (hereinafter – USRL) Executive published a statement entitled "For Canada and the British Empire", in which it called for unwavering faith in the country's democratic institutions. On September 7, the Ukrainian National Federation's (hereinafter referred to as the UNF) magazine "The New Pathway" joined the calls of other diaspora media and added: "We stand in defense of our adopted Fatherland without hesitation, voluntarily, in a joint action". To those readers who came to Canada several decades ago, the magazine's editorial staff explained: "Many of us fought in the World War on the side of our historical enemies, enemies of our people, the occupants of Ukraine. We were forced to take up arms and were driven to the front lines. This time we are in a completely different position. We stand up in defense of our adopted country, the laws of which are our laws, her need is our need and her destiny is our destiny" (Veryha, 1967, pp. 100–102).

It should be noted that at the beginning of the war, Canada did not have a significant army. The situation was further complicated by the government's inability to mobilize young citizens of draft age, since the army service was on a voluntary basis (Veryha, 1967, p. 103).

Meanwhile, on October 31, 1939, in the BUC's newspaper "Ukrayinski Visti" it was written that the Soviet Union had annexed Western Ukrainian lands, and warned that letters would be sent to Canada that would deceive the [90] Ukrainian community with promises and fabrications. Fears were expressed that in this case, people from Galicia and Volyn would fall prey to Soviet propaganda (Kravchuk, 1959, pp. 74–75). The publisher of "Farmerske Zhyttia" and "Narodna Hazeta" was "the Ukrainian Labor Farmer 'Temple Association'" (hereinafter – ULFTA), supported by the Canadian communists (Rusnachenko, 2016, p. 121).

While Ukrainian-Canadian and Canadian communists celebrated the "reunification" of Western Ukraine with the USSR, diaspora national patriots continued to support their relatives

who had gone into military service. The Ukrainian Youth Union of Canada organized regional meetings for its members and their friends on special combat programmes (Veryha, 1967, pp. 103–104). The Ukrainian response to the call to arms was widespread. On February 13, 1940, the Director of Public Information stated that “ten per cent of Saskatchewan enlistments for active service are Canadians of Ukrainian origin, though this particular blood strain is less than 10 per cent of the Saskatchewan population” (Veryha, 1967, pp. 104–105). Local historian Watson Kirkconnell wrote of thousands of Ukrainians heading straight to Ottawa, ready to help Canada in the war in one way or another (Kirkconnell, 1940, p. 5; Kirkconnell, w.y., pp. 4–5).

The constructive propaganda of Ukrainian-Canadian national patriots was countered by communist anti-war propaganda. During the election campaign in early 1940, the Communist Party of Canada put forward the slogan “No conscription! Return Canadian boys back to Canada. Not a single man should leave the Canadian shores to die in the imperialistic war”. But it should be noted that this “call” had little effect on the fighting spirit of the Ukrainian diaspora youth (Veryha, 1967, p. 106).

The strengthening of Canada’s war efforts was facilitated by the creation of the Representative Committee of Ukrainian Canadians (hereinafter referred to as the RCUC) on February 4, 1940. The special subcommittee, headed by Orest Zhrebko, promised the government assistance in war matters. On May 30, 1940, the RCUC addressed Ukrainian citizens of Canada and the British Empire, “Ukrainian farmers, workers, businessmen and professionals”, calling for active work “for the defense of Canada and for victory of Britain...”, emphasizing that “the victory of Britain over Germany signifies hope for the liberation of a great Ukrainian nation in Europe”. Separately, the organization’s leadership addressed the Ukrainian Canadian youth: “Ukrainian youth, keep in mind that the only sure way to protect freedom, so dear to our hearts, is to join the Canadian Army as many of you have already done. The present situation requires more and speedier effort, and more resolute action” (Veryha, 1967, p. 107).

In Memorandum submitted to the Prime Minister of Canada on May 28, 1940, the RCUC’s leadership declared its readiness “to further, in any way within its power, the great war effort of Canada and the Allies and support any just plan that these may approve for liberation of the Ukraine” (Veryha, 1967, p. 107).

At the beginning of June of 1940, in a published communiqué, the Ukrainian Central Committee in Canada (hereinafter referred to as the UCCC) supported the government’s war efforts. On June 9, activists of the Ukrainian Public Committee, led by the director of the Ukrainian Press Bureau in London, Volodymyr Kysilevsky, a teacher Hryhoriy Mazuryk, a doctor Ivan Kucherepa, and a lawyer Teodor Humeniuk, organized a rally in Toronto, at which “it was decided to call on all Ukrainian residents of Toronto to donate to the war fund... At the end of the rally, a considerable amount of money was collected...” (Voytsenko, 1973, p. 26).

At the beginning of September of 1940, the Central Committee of the Red Cross in Winnipeg “at its regular meeting decided to conduct a campaign on donation among the Ukrainian population in close cooperation with the Red Cross...” (Voytsenko, 1973, p. 26). At the end of this month, the leadership of the Ukrainian Women’s Association of Canada (hereinafter referred to as the UWAC) announced a campaign to raise funds to purchase a military ambulance. On October 5–6, delegates to the congress of the UWAC branches in White approved “the current action of the Ukrainian Women’s Association of Canada in the

military competitions of Canada and calls on Ukrainian women to continue to support this action with all their might” (Voytsenko, 1973, p. 38). From mid-October, its leadership began to provide information on the activities of branches for military needs in various localities (Voytsenko, 1973, p. 39). On October 23, under the patronage of the Ukrainian Central Committee in Canada, a concert was held at the Winnipeg City Auditorium, owing to which the Ukrainians “demonstrated a practical way to promote the sale of Canadian war stamps” (Voytsenko, 1973, p. 40).

At its first meeting of the UCC Executive in Winnipeg on December 3, 1940, the plan for future activities was laid out, in which Canada’s war effort became a top priority. The second task of the UCC was to resolve the Ukrainian question in Europe and the problems of Canadian Ukrainianhood (Veryha, 1967, p. 108). On December 21–22, another congress of the Ukrainian Self-Reliance League was held in Winnipeg. The main topics of discussion were “the war effort of our state, our assistance to this effort, and what our work should be at the present time for our Ukrainian affairs...” (Voytsenko, 1973, p. 47). The UCC became a centre that spoke on behalf of Canadian Ukrainianhood. Finally, organizations facilitated its activities (Veryha, 1967, p. 108). However, after its founding on November 6–7, 1940, the UCC faced the problem of dispelling in the minds of the Canadian public the prevailing belief that a significant part of Canadian Ukrainianhood sympathized with the already outlawed diaspora communists as their sole defenders (Piniuta, 1952, pp. 58–59). Despite the complete legal ban on the activities of the Communist Party of Canada and its affiliated organizations, during the period of 1940 – 1941, the Ukrainian-Canadian communists and their like-minded people continued to wage a propaganda war against their opponents, primarily the UNO (Prymak, 1988, p. 54). Meanwhile, the Kremlin used the non-aggression, friendship and border treaties with Germany signed by the Soviet Union on August 23 and September 28, 1939, to postpone the war. In the second half of 1940, due to the defeat of France and the occupation of almost all of Western Europe by the German troops, the threat to the Soviet Union increased sharply, which prompted a number of urgent measures to prepare the country and the armed forces for a possible war. Under these circumstances, the top military and political leadership of the USSR increasingly explicitly postulated a doctrine of offensive actions, which marginalized balanced ideas about the relationship between defense and offense, despite active strategic cooperation with Berlin (Hrytsiuk, Lysenko, & Kydon, 2021, p. 63). Although the Soviet military intelligence repeatedly warned the Kremlin about Germany’s strategic planning of a war against the USSR, Joseph Stalin deliberately “did not allow anyone to convince him of a different outcome than he desired” (Ramazanov, & Levitas, 2020, p. 197). Moreover, the Soviet and Ukrainian-Canadian Sovietophile diaspora press also denied Berlin’s intentions to start a war against the Soviet Union and accused Western governments of disinformation.

Meanwhile, the Ukrainian-Canadian national patriots continued to raise funds for the needs of Ukrainian Canadian servicemen. Thus, on March 22, 1941, a concert was held at the Capitol Theatre in Windsor under the patronage of the Ukrainian Canadian Committee. The local community purchased \$18,000 in bonds. On April 4 of that year, the UCC’s President Father Vasyl Kushnir delivered a check for \$2,265 to the Ukrainian Red Cross headquarters in Winnipeg to purchase ambulances. The funds were raised by the Ukrainian community in various parts of Canada (Borovyk, 1991, p. 79). In 15 counties of Alberta, there was raised the

sum of a million dollars. In Winnipeg, activists raised half a million dollars in bonds and about the same amount in war-savings obligations in two and a half years (Marunchak, 1991, p. 258).

Overall, the overt propaganda campaign of Canadian and Ukrainian-Canadian communists proved largely ineffective (Prymak, 1988, p. 54). The leadership of the UCC did everything possible to minimize the impact of destructive anti-war propaganda from interned diaspora communists on the consciousness of the Ukrainian community. However, their attitude towards their country's participation in the war changed rapidly after the outbreak of the Soviet-German war on June 22, 1941 – suddenly they became very patriotic citizens and began to support the war effort against fascism (Veryha, 1967, pp. 108–109). On June 22, 1941, the Politburo of the Central Committee of the Communist Party of Canada, published a Manifesto entitled “Canadians, all out for the Soviet Victory over fascism”. This document was supported by amnestied Ukrainian-Canadian communists. While all Ukrainian national patriotic independentist diaspora organizations, led by the leadership of the UCC, worked hard for the victory of Canada and its allies, their political opponents called on their supporters for an immediate socialist revolution in Canada and Great Britain with the aim of establishing the Soviet world order mainly not peace (Veryha, 1967, pp. 109–110). At the end of June of 1941, a series of rallies led by the Canadian communists in support of the Soviet Union were held in Montreal, Toronto, and Vancouver. During the first weeks of the Soviet-German war, the Ukrainian-Canadian communist activists began to form committees to help their homeland (Prymak, 1988, p. 58). On July 2, 1,500 Ukrainian-Canadian communists and their supporters gathered for a rally in Toronto and expressed their “solidarity with the peoples of the Soviet Union and Soviet Ukraine” (Kolasky, 1979, pp. 31–32). The Ukrainian-Canadian communists released early from custody appealed to the broad circles of the Ukrainian community in Canada to join it and create local branches (Veryha, 1967, p. 109). On July 26, 1941, in Toronto, at the initiative of several capable and energetic young activists, a conference of representatives of local committees was convened with the participation of 56 people, as a result of which the Ukrainian Association for Aid to the Motherland (UAAM) was established, headed by Mykhailo Mytsak and Mykhailo Dushnytsky (Kolasky, 1979, p. 32). On the same day, activists and rank-and-file members of the newly formed organization called on the federal government of Canada and their like-minded people not only to assist the struggle of the Soviet Union and the Western Allied powers against Germany morally and materially, but also to fight “the Ukrainian fascist, Hitlerite agents and the fifth column”. They even started publishing their own newspaper, “Ukrayinske Zhyttia” (“Ukrainian Life”), which began attacking the Ukrainian Canadian Congress. From then on, this new, Ukrainian progressive-socialist, Sovietophile diaspora organization challenged the UCC in its right to represent the Ukrainians in Canada and did everything possible to undermine its authority among the diaspora (Veryha, 1967, p. 109). Through its own media, it viciously attacked and slandered all of its political opponents on the opposite side, their press, churches, fraternal and cultural organizations as enemies of the Ukrainian people in Europe. In labour issues, the Ukrainian Society for Aid to the Motherland adhered to the party line of hatred and radical agitation (Kordan, 1986, p. 77). The weekly “Saturday Night” even published an article by the Canadian communist Raymond Arthur Davis on July 12, “Ukrainian-Canadians and the War's New Phase”, according to which “nationalists among Ukrainian Canadians, who up to the outbreak of the German-Russian war had been loyal to Canada, now posed a serious

security risk” and are a fertile field for a “Nazi fifth column” nationalists among Ukrainian Canadians, who, now posed a serious security risk and were a fertile field for a “Nazi Fifth Column.”. On July 26, the same magazine [93] published a detailed rebuttal by the Vice President of the UCC and UNF, Vasyl Svystun (Prymak, 1988, p. 59).

On August 28–30, 1941, The VIIIth Congress of the Ukrainian National Federation was held in Winnipeg, at which the UCC’s President, Vasyl Kushnir, and the leader of the UNF’s National Executive, Volodymyr Kossar, called for active support for Canada’s war efforts and for informing its government and the public about international events related to Ukraine (Kordan, 1986, pp. 81–82). In order to counteract the Sovietophile propaganda of its own political opponents, the UCC’s Headquarters issued Communiqué No. 11 on September 17, 1941, in which it warned the community against naive sympathy for disguised communism (Veryha, 1967, p. 109). “There is no doubt that the aforementioned society is trying to use the fact of the Russo-German war and the fact of the alliance between the Soviets and the Allies as an opportunity to regain the political and economic influence of the communist movement among Ukrainians in Canada, under the guise of ‘helping the homeland’ and patriotic and democratic slogans” – emphasized the leaders of the Ukrainian Canadian community in their address to Canadian Ukrainianhood (Voytsenko, 1973, p. 78).

A violent reaction of diaspora Ukrainians to some extent prompted the Canadian federal government to review its military programme. Wanting to free itself from the previous obligation not to introduce military service, the Canadian federal government announced a national plebiscite on April 28, 1942, to repeal the old law on voluntary military service. The people approved governmental idea (Gerus, 1982, pp. 199–200). However, the real surprise was the votes of the prairies inhabitants, where the Ukrainians and other ethnic minorities lived, whose representatives opposed this idea of the country’s government (Kordan, 2001, pp. 105–106). The results caused shockwaves across Canada. Immediately the majority of the press interpreted the vote as a measure of loyalty to Canada, rather than a complex and controversial political issue the prime minister and his inner circle had considered it (Prymak, 1988, p. 72). Diaspora communists accused political opponents from the national patriotic camp of voting against mandatory national conscription for military service abroad (Potrebenko, 1977, p. 276).

In connection with a rapid influx of Ukrainian youth into the Canadian armed forces in January-February of 1942, the UCC Presidium concluded agreements with the federal government of the country to ensure the spiritual care of the Ukrainian Christian faith among Ukrainian soldiers. In the first half of February of 1942, Father Mykhailo Pelekh was appointed military chaplain among all Greek Catholic soldiers, and Father Semen Savchuk – among Orthodox soldiers. Later, they were joined by Fathers Theodosius-Theodor Dobko and Mykhailo Horoshko among the Greek Catholics and Fathers Toma Kovalishyn and Stepan Symchych among the Orthodox (Veryha, 1967, p. 113).

The Ukrainian Canadian Committee cared for Ukrainian servicemen abroad constantly, providing them with material and moral assistance (Piniuta, 1952, pp. 58–64). A canteen started operating in the club quarters of Manchester, where the Ukrainian Canadian Servicemen’s Association (hereinafter – UCSA) lived, led by Lieutenant Bohdan Panchuk. The UCC undertook to subsidize the canteen in England in the amount of \$500 per month. In 1944, donations by the UCC for food for servicemen amounted to approximately \$5,725

(Veryha, 1967, pp. 113–113b). It should be noted that the hostesses of the UCSA house were Ukrainian servicemen of the Canadian Women's Army Corps, Lieutenants Ann Cherniavsky and Ann Craplive, Sergeant Helen Kozisky (Maivorov, 2017, p. 287). In order to maintain the morale of Ukrainian Canadian servicemen, the UCC's leadership formed a special commission to [94] oversee their welfare. The commission included the president, judge and lawyer Ivan Solomon, a public figure, jurist, and a former sergeant major of the Ukrainian Galician Army and the leader of the Ukrainian War Veterans' Association Board Ivan Huliai, the Ukrainian Canadian Women Committee's President, educator Maria Dyma, and military chaplains Fathers Mykhailo Pelekh and Semen Savchuk (Veryha, 1967, pp. 113b–114).

By supporting clubhouses in Manchester and London, to which all other non-Ukrainian Canadians and Ukrainian Americans were also invited, the UCC leadership helped a tireless Captain Bohdan Panchuk, who led the UCSA, establish "a home away from home" where Ukrainian Canadian servicemen could take advantage of all the facilities. While women's organizations looked after the supply of food to the UCSA club in London, the organizations of the UCC that published their own newspapers or magazines sent copies to the club's reading room. Thus, Canadian military personnel of Ukrainian origin who were stationed abroad could be confident that not only their parents and relatives, but also the entire Ukrainian community were concerned about their well-being.

The Toronto branch of the Ukrainian Women's Committee of Canada participated in the Red Cross campaign and in April of 1945 in its assigned district with a numerous Ukrainian population, raised over \$2,000, and received special recognition for its well-organized work (Veryha, 1967, pp. 120–121).

On June 4-6, 1942, the leadership of the Ukrainian Association for Aid to the Motherland held a national convention in Winnipeg. 160 delegates decided to rename their organization the Association of Ukrainian Canadians (hereinafter referred to as the AUC) and adopted a series of resolutions calling for the fullest possible participation of Ukrainian Canadians in the war effort, conducting financial campaigns for the benefit of civilian victims in Great Britain and Soviet Ukraine, sending food, tobacco, cigarettes, and medical aid to wounded Red Army soldiers, and "unsparingly expose before the people and the government Canada's internal enemies, the fifth-columnists, Hitler agents, saboteurs and spies operating in the Ukrainian Canadian environment, and foster strong militant morale among Ukrainian Canadians" (Prymak, 1988, pp. 77–78). On June 11, 1942, the editorial board of the ACU magazine "Ukrayinske Zhyttia" ("The Ukrainian Life") stated the following in its own author's article: "Guided by the desire to do everything in their power to help defeat fascism, which causes Ukraine to bleed and threatens Canada and the entire democratic world, the Congress pledged a continued full and unconditional support for Canada's military effort and developed and adopted a broad military programme for increased participation of the entire organization in Canada's military war effort" (CSAPAUS, f. 1, d. 23, c. 118, p. 24).

An important part of the political programme of the Association of Ukrainian Canadians was the demand for the return of all confiscated property of the "Ukrainian Labor Farmer's Temple Association" to it as its legal successor. Since the leadership of the renamed Ukrainian progressive socialist Sovietophile diaspora organization admitted that all the property of the "Ukrainian Labor Farmer's Temple Association", thus confiscated from the liquidated illegal organizations, was owned by the Crown and completely beyond

the jurisdiction of the courts, its representatives began campaigning for the return of this property through prominent people who conveyed the demands of the leadership to parliamentarians and members of the Canadian federal government. A particular point that was very consistently played on by the Association of Ukrainian Canadians' agitators was the resale by the Public Custodian of Canada of several confiscated halls to the Ukrainian National Federation in accordance with the decision to [95] use or alienate many of such halls. The psychological impact on the Association of Ukrainian Canadians members of losing their halls to their hated political opponents helped maintain enthusiasm in their organization and created a state of elation, so necessary to support their demands on the Government (RCMP Security Bulletins, 1993, p. 80).

In January – February of 1943, the situation changed significantly in favour of the Ukrainian-Canadian communists in Canada. Their ranks were replenished with former interned leaders and hundreds of new young members. In eastern Europe, the Soviet troops had already begun to press the Nazis: they broke through the blockade of Leningrad and recaptured Voronezh, Kursk, and Stalingrad (Kolasky, 1979, pp. 69–70). After the Red Army's successful offensive at the southern flank of the Soviet-German front, the struggle for the Dnieper borders resumed – in mid-February, the Voronezh and Southwestern Fronts almost reached the Dnieper near Dnipropetrovsk and Zaporizhzhia. At that time, the Soviet command set too complicated goals to the troops, aiming at developing the offensive to the river. Thus, the Voronezh Front was ordered to seize Sumy, Okhlyrka, Poltava, and then advance in the general direction towards Kyiv and reach the city before the Dnieper icing began. The troops of the Southwestern and Southern Fronts were tasked with defeating the Donbass enemy group and reaching the Dnieper in the strip from Kremenchuk to Dnipropetrovsk. However, at the end of March of 1943, as a result of successful counterattacks by the German troops of Army Group South near Kharkiv, the Red Army was forced to occupy the lines along the Siverskyi Donets from Bilhorod to Voroshylovhrad (Lysenko, & Pyliavets, 2019, p. 100). Still the Sovietophile euphoria was at its height in Canada. Canadian and Ukrainian-Canadian communists were riding the wave of the Red Army's success and admiration by the Soviet Union in the world. It was the most inopportune time to raise the issue of the postwar status of its territories (Kolasky, 1979, p. 70). At the same time, in the winter of 1942 – 1943, relations between the USSR and the Polish government-in-exile in London continued to deteriorate due to differences of opinion over the formation of the Polish army on the territory of the USSR and the latter's desire to discuss the issue of the western territories of Ukraine and Belarus, which belonged to Poland during the interwar period. Moscow was already much more aggressive and hostile in reminding of the "sovereign rights of the USSR to the specified territories", referring to the territories it invaded in 1939 (Eberhardt, 2006, p. 36). On February 20, the National Council of the Polish Government-in-Exile in London declared that "the territorial integrity of the Republic of Poland within the borders of September 1, 1939 and its sovereignty are inviolable and indivisible" (Eberhardt, 2006, pp. 36–37).

Constant sharp disputes between the Polish government-in-exile and the Soviet government on the issue of the belonging of Western Ukraine and Belarus provoked a reaction from the Ukrainian Canadian Committee, which believed that the official Polish position, not to mention the Soviet one, contradicted the spirit of the Atlantic Charter (Kordan, 2001, p. 79). At that time, the Soviet embassy in Canada received hundreds of reports from the

Canadian liberal press about the increased activity of the Ukrainian Canadian Committee in the context of the Ukrainian issue, which caused concern in the international department of the Central Committee of the All-Union Communist Party (Bolsheviks) (CC VKP(b)) (Black, 1998, pp. 148–149). On March 17, 1943, the editorial board of the UNF publication “The New Pathway” published the article on territorial disputes between the Soviet Union and its neighbours, which illustrated the following trend, according to which Soviet Ukraine was a “woman slave in a sultan’s harem”, by which was meant the “Muscovite Empire”, and compared it to the occupation of Norway, the Netherlands and Belgium by Germany [96] (Kordan, 1986, p. 98). In protest against the statement of the Polish government in exile, on March 23, 1943, the Ukrainian Canadian Committee’s headquarters, headed by its president Vasyl Kushnir, issued a memorandum to the Prime Minister of Canada, William Lyon Mackenzie King (Kolasky, 1979, p. 69). On March 30, Anthony Hlynka, a member of the 19th House of Commons of the Canada’s federal parliament, delivered this text to the country’s Prime Minister (Borovyk, 1991, p. 294). The authors stated that the views of the UCC “could be useful in formulating Canadian foreign policy and consolidating our war efforts”. The memorandum “concernedly considered the thesis put forward by the Polish government... which advocates that such a border should pass through the centre of an ethnic territory inhabited by Ukrainians”. Representatives of the leadership of the UCC reminded the federal government that “the Atlantic Charter clearly and unmistakably enshrines as a principle the right of the people to determine their political destiny”, and argued that “the post-war settlement... should lead to the final political unification of the territories inhabited by the Ukrainians”, and that the claims of the Ukrainians “to an independent free state in free Europe cannot be ignored and that the Ukrainian issue must be included in any just and final settlement in Europe” (Kolasky, 1979, p. 69). At the end of the memorandum, it was written: “Whenever the Ukrainian people had the opportunity, they openly declared their sovereign rights and demanded self-government” (CSAPAUS, f.1, d. 23, c. 526, p. 1).

Canadian Department of External Affairs officials viewed such calls with apprehension. Phrased in the language of the Atlantic Charter, these calls only further agitated the supporters of independence, who interpreted it as a legitimate goal of the war. The calls also attracted the attention and anger of the Ukrainian-Canadian communists, with all the predictable consequences (Kordan, 2001, p. 80). On April 7, 1943, the head and secretary of the National Executive Committee of the Association of Ukrainian Canadians, Ivan Horbatiuk and Mykhailo Dushnytsky, sent a telegramme to Canadian Prime Minister William Lyon Mackenzie King, the British Minister of Foreign Affairs, Anthony Eden, and the Canadian under-secretary of External Affairs Norman Robertson. They stated that the UCC includes organizations led by Pavlo Skoropadsky and Andriy Melnyk, “two Ukrainian pro-fascists now residing in Nazi Germany and working for a Nazi-Fascist victory in Europe”, and added that “the Ukrainian Canadian Committee consists of open enemies of Canada and friends of Hitler” (Prophets and proletarians, 1990, pp. 344–345). The leadership of the Association of Ukrainian Canadians, advocating for the release of its interned “anti-fascist” leaders and the lifting of the ban on its own activities, accused its political opponents of collaborating with the Nazis and called on Ottawa to use the War Measures Act to suppress anti-Soviet “propaganda” in the Ukrainian national patriotic diaspora press (Petryshyn, 2011, pp. 233–234). The Canadian press supported this story and, in the “The Windsor Star” newspaper, stated

that the UCC could not represent the Ukrainian nation, and that the people of Ukraine would speak for themselves “when the last invader is driven out” (Kordan, 2001, pp. 80–81).

The leaders of the Association of Ukrainian Canadians appealed to the Soviet secret services, the party and state leadership with a request to support them in the fight against the UCC (Istoryia Ukrainskoi SSR, 1984, p. 574). On April 5, the editor of the Association of Ukrainian Canadians’s magazine “The Ukrainian Life” in Toronto, Stepan Matsievych, in his letter to the party leadership of the Ukrainian SSR, requested the publication of an article written by a writer, journalist, or public figure, preferably from the Union Republic. The Ukrainian-Canadian journalist, who wrote articles to the leaders of local Ukrainian communists, emphasized that the UCC was not authorized to make any statements on behalf [97] of Ukrainian Canadians, because it consisted of “politically anti-Soviet-minded emigrants, fierce nationalists, and a pro-fascist element, whose recognized leaders, Skoropadsky and Melnyk, are in the service of the Hitlerite occupants” (OUN i UPA v 1943 rotsi. Dokumenty, 2008, p. 112). On April 20, 1943, the First Secretary of the Central Committee and the Kyiv Regional Committee of the CPU (b) and a member of the Military Council of the Voronezh Front, Nikita Khrushchev, sent the articles to Joseph Stalin, the Supreme Commander-in-Chief of the Armed Forces of the Soviet Union, the head of the Council of People’s Commissars and the State Defense Committee, the People’s Commissar of Defense and Secretary of the Central Committee of the All-Union Communist Party (Bolsheviks). The articles were written by Oleksandr Bohomolets, the President of the Academy of Sciences of the Ukrainian SSR and Vice-President of the Academy of Sciences of the USSR, a pathophysiological scientist, and by Pavlo Tychyna, the People’s Commissar of Education of the Ukrainian SSR, a poet, publicist and translator. The articles were directed against the UCC. Nikita Khrushchev also asked to inform him on Stalin’s opinion and the amendments made to the texts, if necessary (CSAPAU, f. 1, d. 23, c. 526, pp. 2–21).

On May 13, 1943, the first large-scale informational and psychological special operation of the Soviet Union against the UCC took place during World War II at the nationwide level – in the official mouthpiece of Moscow-Bolshevik party propaganda, the newspaper “Pravda”, the articles by Oleksandr Bohomolets and Pavlo Tychyna were published under the telling titles “Soviet Ukraine and Ukrainian-German Nationalists in Canada” and “Get Your Dirty Hands Off Ukraine” (Ukraina: khronika XX stolittia. Roky 1941 – 1943., 2005, p. 431). Pavlo Tychyna, in particular, called the memorandum of the UCC to the Canadian Prime Minister William Lyon Mackenzie King dated March 23, 1943, “the uninvited kindness of cunning foxes”, who supposedly pretend to be knights, but continue to “remain dogs” only because they “want to hand the Ukrainian people over to the bloody vice of Hitler executioner”. Pavlo Tychyna wrote that diaspora national patriots “pretend to be God-fearing, just, and honest – oh! – even innocent lambs, forgetting that every slaughtered lamb is then hung by its own leg”. Calling the UCC a “quisling clique”, he reproached it for allegedly inciting enmity between allies, stating that its leaders had no right to speak on behalf of all Ukrainians in Canada and the entire Ukrainian people. By the way, Pavlo Tychyna expressed hope that the idea of reviving Ukrainian statehood would be rejected by the very Ukrainian people: “Let the peoples of the world who are fighting for their freedom not believe the Ukrainian-German nationalists from the “Ukrainian Canadian Committee” who babble in their senile tongue about an allegedly independent, separate Ukraine under the auspices of Hitler. Independence,

we repeat once again, is inconceivable without mutual respect among nations, without equality of nations, and the cannibal Hitler does not recognize the idea of equality of nations, he tramples it underfoot” (Tychina, 1943, p. 3).

On June 2, 1943, “The Winnipeg Free Press” came to the defense of the Ukrainian Canadian Committee, stating that “any attempt to brand the Ukrainian Canadian Committee as a Hitlerite outfit does not stand examination” (Kolasky, 1979, p. 74). To clarify the situation, the Ukrainian Canadian Committee’s leadership announced the convening of the First All-Canadian Congress of Ukrainians in Canada, which was scheduled to be held in Winnipeg on June 22–24, 1943. Subsequently, diaspora communists launched an active campaign throughout Canada, calling on ordinary Ukrainian Canadians to boycott the Congress, not to send delegates there, and not to participate in it personally (Piniuta, 1952, p. 60). Supporters of the Assosiation of Canadian Ukrainians also attempted to sow seeds of discord in the ranks of the national patriotic camp of Canadian Ukrainians in order to disrupt the first congress of the UCC, appealing to all its participants to expel the UNO from its ranks on June 15 (Kolasky, 1979, p. 72). Of course, the national patriots refused their opponents such an offer. Despite the communists’ efforts to disrupt the Committee’s activities, the First All-Canadian Congress of Ukrainians in Canada was held on June 22–24, 1943, at the Royal Alexandra Hotel in Winnipeg. 600 delegates represented people from all walks of life – clergy, farmers, professionals, businessmen, merchants, workers. At the First Congress it was proved that the UCC, which represents a very significant part of the Ukrainian community, was the only authoritative, qualified body (Piniuta, 1952, p. 60). At the First Congress of the Canadian Ukrainianhood’s leadership there was also adopted resolution No. 10, in which it expressed approval of the activities of the UCC and called on it to continue “to support its further efforts and its work for the good of Canadian Ukrainians and for the good of Canada” (Persnyi Vse-Kanadiiskyi Konhres, 1943, p. 185).

On June 8, 1944, Canada’s Minister of National Military Service, Major General Leo Richer Lafleche, stated: “... our present military forces include a large number of men and women belonging to ethnic groups of European descent. We are only now beginning to understand what a valuable asset these tens of thousands of people who are fluent in European languages represent in our war councils, whose knowledge will be useful to us during the invasion and isolation of the continent... we have so many people among them... that it would be possible to create three full divisions consisting of them... will it not surprise you when I tell you that we could have put more than one division of our army, twelve thousand speak Ukrainian... <...> Therefore, it is quite understandable that we find their names on our lists of awards for bravery and our lists of executions...” (Borovyk, 1991, p. 79).

However, misunderstandings between the leadership of UCC and the federal government continued to grow (Petryshyn, 2011, p. 235). World War II was ending, but it didn’t bring any improvement for Ukraine (Baran, 1995, p. 92). In February of 1945, at the insistence of the USSR, fundamental decisions were made in Yalta regarding the veto right of the permanent members of the UN Security Council, as well as the inclusion of the Ukrainian and Belarusian Soviet Socialist Republics into the founding countries. The United Nations founding conference was open to states that declared war on the Axis powers by March 1. On April 25, 1945, about 300 delegates and 1,500 advisors and experts from 47 countries around the world arrived at the founding conference of the United Nations in San Francisco

(delegations from Soviet Ukraine and Belarus, as well as Argentina, joined the conference participants after its opening, in early May). All participants were convinced that ensuring a just peace was possible only through the activities of a new international organization, which would be based on the unification of democratic countries into a strong alliance (Vidnianskyi, & Martynov, 2020, pp. 79–80).

Meanwhile, the leaders of the Ukrainian Canadian Committee and the Ukrainian Congressional Committee of America (UCCA) sent a joint “*parallel delegation*” there in April of 1945, insisting on its acceptance as a genuine (Leshchenko, 2001, p. 540). The Ukrainian-Canadian national patriots drafted “Memorandum to the Canadian Delegation at the United Nations Conference in San Francisco on International Organization”, which was published in “The New Pathway” on May 26. It ran that the UCC represents Canadian Ukrainianhood, but that in Europe the Ukrainians lack true freedom of speech and need “a free and independent state within Ukrainian ethnographic boundaries”. The document concluded with a request to create a UN Security Council to ensure the implementation of the proposed Bill of Human Rights with the aim of resolving the Ukrainian issue finally, otherwise the world’s military political confrontations would continue (Prymak, 1988, pp. 122–123).

The UCC’s President, Father Vasyl Kushnir, with the assistance of the Deputy Minister of External Affairs of Canada, Norman Robertson, spoke with the People’s Commissar for Foreign Affairs of the Ukrainian SSR, Dmytro Manuilsky, who headed the delegation of the Union Republic. The meeting was attended by Canadian Prime Minister William Lyon Mackenzie King, and the conversation took place in a tense atmosphere. Vasyl Kushnir protested against the arrest of intellectuals in Ukraine and insisted on the introduction of individual freedoms for all Ukrainians. Dmytro Manuilsky responded with formal Soviet phraseology in order to refute the guest’s words (Baran, 1995, p. 92). Nevertheless, he was forced to hold a press conference on May 22, after which the Ukrainian issue gained global publicity (Prymak, 1988, p. 124). Thus, the joint mission of the UCC and the UCCA had a strategic result – “the Ukrainian diaspora rejects the Soviet regime and its repressions and the communist system in Ukraine in general” (Baran, 1995, p. 92).

The war effort transformed the popular image of Ukrainians as “quaint peasants, fanatical nationalists, and potential revolutionaries” into a model of normal people deeply integrated into Canadian society. For the Ukrainians themselves, the war instilled self-confidence as full citizens at a crucial time (Gerus, 1982, p. 200).

An active participation of the Ukrainian Canadian Committee in bringing about victory over the enemy in the war contributed to further cooperation among Ukrainians and other ethnic groups in the country (Veryha, 1967, p. 133).

Member of the House of Commons of the Federal Parliament of Canada, Paul Martin, in his speech at the Second Congress of Ukrainians in Canada, held in Toronto on June 4–6, 1946, noted: “By your actions during the war, you have shown that you are brave and resilient. You have proven that you are willing to help and cooperate. You have especially shown that you love Canada and that you are worthy of being called Canadians” (Druhyi Vse-Kanadiiskyi konhres, 1946, p. 50).

Conclusions. The leadership of the Ukrainian Canadian Committee, together with its constituent and other public, youth, and cultural and educational organizations, from

the moment of its founding in Winnipeg on November 6–7, 1940, conducted an agitation campaign among the youth of the Ukrainian diaspora of Canada by publishing declarations, communiqués, appeals in the press, announcing art evenings, performances, raffles and other events to collect donations for the needs of the Canadian Armed Forces, and rallied around itself all the “loyal elements” of the Ukrainian community in this country. The Ukrainian Canadian Committee supported the morale of 35,000–40,000 Ukrainian servicemen of the Canadian Armed Forces abroad, providing them with material and moral assistance. The contribution of Canadian Ukrainianhood [100] and their leadership in the form of the Ukrainian Canadian Committee to the victory over Nazi Germany in World War II was highly appreciated by the Anglo-Canadian press, Canadian state and public figures, scientists, and all other friends of the country’s Ukrainian community and its researchers. The participation of the Ukrainian Canadian Committee in the war efforts of the residence country of the Ukrainian diaspora contributed to the deep socio-political integration of the community into civilized Canadian society, instilled in its representatives self-confidence as full citizens at a fateful time for Canada and the world. Having held its first Congress on June 22–24, 1943 in Winnipeg, the main national patriotic representative organization of Canadian Ukrainianhood, countering the Soviet and Sovietophile propaganda, was able to establish itself as an authoritative body representing and defending the interests of Canadian Ukrainianhood before the federal government and the Canadian public.

A promising direction for further research is the study of the UCC’s relations with other Ukrainian diaspora organizations around the world. Further research is needed to compare the public and political activities of the Ukrainian Canadian Committee and the Association of Ukrainian Canadians during World War II in the context of supporting Canada’s war effort and the Ukrainian question.

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**ILLEGAL MIGRATION OF JEWISH REFUGEES FROM POLAND
TO THE AMERICAN OCCUPATION ZONE IN EUROPE IN 1945 – 1948**

Abstract. *The purpose* of the research is to analyze the causes, dynamics, and consequences of the illegal migration of the Jewish refugees from Poland to the American occupation zone in Europe in 1945 – 1948, highlighting its political, social, and geopolitical implications. **The research methodology** is based on the principles of a concrete historical approach – historicism, objectivity, comprehensiveness, integrity and systematicity, as well as on the methods of analysis and synthesis, historical and comparative, problem-chronological methods. **The scientific novelty** of this research consists in its detailed analysis of how the illegal migration of the Jewish refugees from Poland to the American occupation zone shaped and was influenced by the U.S. policy during the post-war period. By analyzing archival materials and declassified intelligence reports, in the study there have been highlighted the strategic and humanitarian dimensions of American responses, including the interplay between refugee management, geopolitical interests, and the evolving stance on Palestine. This research provides new insights into how the U.S. policy adaptations to migration crises reflected broader objectives, revealing the intersection of domestic priorities and international diplomacy in the mid-20th century. **Conclusions.** The illegal migration of the Jewish refugees from Poland to the American occupation zone in Europe in 1945 – 1948 was a complex and multifaceted phenomenon shaped by the interplay of political, social, and economic factors. Key drivers included anti-Semitism, economic instability, and widespread disillusionment with the post-war political order, but the movement's motives and organization remain subjects of debate. While some migration was spontaneous, others suspected coordinated efforts by Zionist organizations or external actors, which prompted the U.S. authorities to launch investigations into the causes, motives, and nature of these flows. American intelligence agencies and counterintelligence units played a critical role, uncovering both humanitarian and political dimensions of the migration, as well as alleged collusion between certain organizations and the Soviet authorities.

In response, the U.S. government implemented specific measures, including the establishment of separate refugee camps, diplomatic negotiations with Allied powers, and policy adjustments to address the influx. Simultaneously, the issue of Jewish refugees intersected with the geopolitical future of Palestine,

where their plight became a critical factor in the U.S. and British deliberations on the establishment of the Jewish state. The migration crisis not only underscored the urgency of resolving the Palestinian issue but also demonstrated how displaced people became a catalyst for broader shifts in international policy. Thus, this study contributes to a deeper understanding of post-war migration processes, the political and humanitarian strategies they inspired, and their enduring impact on global geopolitics.

Key words: U.S. refugee policy, illegal migration, Jewish refugees, post-war Europe, American occupation zone, displaced people, Palestine issue.

НЕЛЕГАЛЬНИЙ МІГРАЦІЙНИЙ РУХ ЄВРЕЙСЬКИХ БІЖЕНЦІВ З ПОЛЬЩІ ДО АМЕРИКАНСЬКОЇ ОКУПАЦІЙНОЇ ЗОНИ В ЄВРОПІ У 1945 – 1948 РР.

Анотація. Метою розвідки – є аналіз причин, динаміки та наслідків нелегальної міграції єврейських біженців із Польщі до американської окупаційної зони в Європі у 1945 – 1948 рр. із акцентом на її політичні, соціальні та геополітичні аспекти. **Методологія дослідження** ґрунтується на принципах конкретно-історичного підходу – історизму, об'єктивності, цілісності, комплексності та системності. Використано також методи аналізу й синтезу, історико-порівняльний і проблемно-хронологічний. **Наукова новизна** дослідження полягає у вивченні того, як нелегальна міграція єврейських біженців формувала американську політику у повоєнний період і водночас зазнавала її впливу. Завдяки аналізу архівних матеріалів і розсекречених звітів, дослідження розкриває стратегічні та гуманітарні аспекти американської політики, включно з її реакцією на гуманітарні кризи, підозрювану участь сіоністських організацій, а також еволюцію підходів США до питання Палестини. Робота висвітлює, як американські спецслужби та політики адаптували свої дії до міграційної кризи, відображаючи ширші стратегічні й дипломатичні цілі у середині ХХ ст.

Висновки. Нелегальна міграція єврейських біженців із Польщі до американської окупаційної зони була багатограним явищем, зумовленим переплетенням політичних, соціальних і економічних чинників. Серед основних руйнівних сил були антисемітизм, економічна нестабільність, страх перед комуністичним режимом і загальна недовіра до повоєнного політичного ладу. Попри часткову спонтанність міграційного потоку, деякі аспекти вказують на можливу організовану участь, зокрема сіоністських організацій, що спонукало американську владу до розслідування причин, мотивів і характеру цих переміщень. Звіти американських спецслужб засвідчили як гуманітарний вимір, так і політичні мотиви міграції, з-поміж іншого, припущення про співпрацю певних організацій із радянськими структурами.

У відповідь уряд США вжив низку заходів: організацію окремих таборів для мігрантів, дипломатичні переговори з іншими союзними державами, розробку директив для управління міграційними контингентом. Особливе місце в американській політиці посіло питання Палестини, де доля біженців стала важливим фактором у дискусіях про створення єврейської держави. Ця криза не лише висвітлила гуманітарні виклики, але й стала каталізатором глобальних змін у міжнародній політиці. Дослідження робить внесок у розуміння повоєнних міграційних процесів і стратегій великих держав у відповідь на ці виклики.

Ключові слова: політика США, єврейські біженці, нелегальна міграція, повоєнна Європа, сіоністські організації, американська окупаційна зона, палестинське питання, переміщені особи.

Problem Statement. The early postwar years marked a period of recovery from the global catastrophe. Through the efforts of the Allied countries and international organizations overseeing refugee assistance, a process of organized repatriation of populations to their stable countries of residence commenced.

On the eve of this unprecedented population transfer campaign, Germany and Austria hosted 11,078,000 individuals identified by the Allies as eligible for repatriation. Specifically, 5,992,000 individuals were under the control of the Supreme Headquarters Allied Expeditionary

Force (SHAEF), while 4,502,000 were located in the Soviet-occupied zones (Proudfoot, 1956, p. 189). By August of 1945, 65% of displaced people in the American zone (1.66 million individuals repatriated to 17 countries) had been relocated. In the three western zones, 2,174,182 individuals remained, with the Poles forming the largest group at 899,950 (*The Evening Star*, 1945, № 36981, Aug. 4, p. 2). At the same time, the most intense phase of repatriation occurred in May and June of 1945, with 5.25 million people returning home (Proudfoot, 1956, p. 228). The peak eastern flow occurred on June 5, 1945, when 600,000 individuals were transferred to the Soviet zone in a single day. By September 30, 1945, when 2,034,000 individuals had been moved to the Soviet Union, large-scale repatriation ceased effectively. Meanwhile, between May and September of 1945, the Soviet authorities transferred 22,279 U.S. citizens from Europe and 1,275 from the Far East (Proudfoot, 1956, p. 220).

However, the challenges associated with population transfers did not end with organized repatriation efforts. By late October of 1945, the American occupation authorities in Europe were confronted with a new and unexpected wave of illegal Jewish migration from Poland. This movement posed significant logistical, political, and humanitarian challenges. The situation further complicated the U.S. policies, particularly as it intersected with a broader geopolitical issue of Palestine and its role as a potential destination for the Jewish refugees. The illegal migration of the Jewish refugees became a focal point in the postwar migration crisis, highlighting the tensions between humanitarian obligations, national interests, and international diplomacy. Understanding the causes, dynamics, and implications of this migration is critical to shedding light on the broader context of postwar displacement and the role of the U.S. policy in addressing these complex challenges.

Review of Recent Research and Publications: The issue of post-war refugee migration has been studied extensively, yet the illegal migration of Jewish refugees from Poland to the American occupation zone remains an underexplored aspect of this broader phenomenon. Hilton (2001) and Lavsky (2002) focus on the experiences of Jewish refugees in displaced people camps, shedding light on their living conditions and efforts toward social rehabilitation. Kochavi (2001) examines Allied refugee policies, emphasizing the geopolitical challenges of the immediate post-war period. Genizi (1994) and Wyman (1998) did the research on the role of international organizations and resettlement programmes in addressing the refugee crisis. Friedla (2021), Antons (2014) and Huhn (2023) suggest valuable insights into the socio-political, legal, and humanitarian dimensions of displacement, which are essential for contextualizing the movements of Polish migrants into the American zone.

However, the clandestine movement of refugees from Poland and its implications for the U.S. policy in Europe represents a lesser-known chapter of post-war history, necessitating further scholarly attention.

The purpose of the study is to explore how the illegal migration of Jewish refugees influenced the U.S. post-war policies concerning refugees and displaced people particularly in the context of the emerging geopolitical order and the resolution of the question of establishing the State of Israel.

Results of the Research. A new challenge for the American occupational authorities in Europe arose with the robust wave of illegal Jewish migration from Poland, which began in late October of 1945 (Antons, 2014, p. 98). Initially, migrants were accepted without objections. However, as the flow intensified, discussions among the Allies questioned whether the migration was part of an organized plan. On December 5, 1945, the British refused to accept refugees in their sector of Berlin, alleging the entire process was a conspiracy. In

contrast, the Americans continued to allow migrants in 1946 and partially in 1947, though debates about border closure frequently arose.

American authorities sought to address this new issue through coordination with other occupying powers in Germany. However, in early December of 1945, during a quadripartite meeting of the Directorate on Prisoners of War and Displaced People, the Soviet side rejected an American suggestion to distribute the Jewish refugees. If approved, the plan would have allocated 34% of migrants to the American zone, 41% – to the Soviet zone, 22% – to the British zone, and 3% – to the French zone (Kochavi, 2001, p. 167).

Notably, differing perspectives existed within the American leadership on how to respond to the influx of refugees (Gatrell, 2020, p. 292). The War Department advocated for the immediate closure of borders in the occupation zones of Austria, Italy, and Germany. In contrast, the State Department advised closing borders only in case of a sharp increase in migrant numbers and adhering to principles of hospitality if current levels persisted. Additionally, Undersecretary of State Dean Acheson proposed convening a conference with State Department, War Department, and the Jewish organizational leaders to discuss border closures in the occupation zones (NARA, RG 59, M 1284, R. 62, img. 23–24). Subsequently, on December 9, 1945, the United States Forces European Theater (USFET) issued a directive concerning illegal migrants (infiltrators), stipulating that they should be accommodated in camps but kept separate from displaced people and provided assistance until an official policy was established (Hilton, 2001, p. 325).

By mid-December of 1945, the scale of Jewish refugee influx from the east had grown significantly. According to the U.S. refugee official D. Warren, an average of 550 individuals arrived daily from Poland. This information was corroborated by a telegramme from the U.S. embassy in Warsaw, which reported the daily crossing of 300 Polish Jews into Bavaria and 250 into Berlin (NARA, RG 59, M 1284, R. 60, img. 133). Defense Department officials suspected collusion between Zionist organizations and the Soviet authorities (NARA, RG 59, M 1284, R. 60, img. 122). On December 19, 1945, General D. McNarney sent a request to the State Department seeking guidance on further actions – whether to continue accepting refugees on humanitarian grounds or to apply Military Government Law No. 161 on border control, which provided for a complete ban on civilian border crossings, including the movement of goods or property (Law № 161, 1944, p. 30).

Soon, on December 21, 1945, the issue of the influx of Polish Jews into the American occupation zone was discussed during a special meeting at the State Department (NARA, RG 59, M 1284, R. 60, img. 123–124). George Warren suggested that the military command would not be able to handle the influx of refugees and that it should be halted. Conversely, John Hickerson, Head of the European Affairs Division, pointed at the presence of anti-Semitic sentiments among the Poles and the government weakness, which was unable to control its borders. Deputy Secretary of State Dean Acheson warned against adopting inconsistent decisions that would contradict the presidential course on refugees. It was decided that the Civil Affairs Division of the War Department would receive temporary approval to continue this “humanitarian action” until the end of the year, with a final decision to be developed after direct consultations with the White House (Kochavi, 2001, p. 137).

Meanwhile, the U.S. Secretary of War Robert Porter Patterson expressed the view that providing food and shelter for refugees was insufficient to meet their needs. He noted that the department consistently adhered to the policy of transferring DP camps to international organizations. Consequently, Patterson advocated for the U.S. government to establish a

civilian agency, similar to the War Refugee Board (WRB), to manage the growing number of German and Jewish refugees in Europe (NARA, RG 59, M 1284, R. 60, img. 116–118).

Secretary of State James Byrnes, citing refugee testimonies, considered pogroms the primary reason for the migration of Polish Jews. He opposed their return to Poland and proposed developing a plan for further migration to other countries (NARA, RG 59, M 1284, R. 60, img. 128). Byrnes also supported the War Department's proposal to create a dedicated governmental or international body to oversee DPs in Europe. He emphasized that the U.S. would continue providing asylum to all individuals seeking it in territories under American administration.

However, E. Dubrow, Head of the State Department's Polish Section, believed that the migration movement was orchestrated by Zionists and should therefore be stopped (Kochavi, 2001, p. 137). In a private conversation in early November of 1945, Stanisław Mikołajczyk, the Second Deputy Chairman of the Provisional Government of National Unity, informed Dubrow that there were no significant pogroms within the territory of the Polish Republic (NARA, RG 59, M 1284, R. 60, img. 119–121). Mikołajczyk added that anti-government elements, which had become active following the inclusion of Jewish ministers in the transitional government, were behind the pogroms. Referring to Emil Sommerstein, Chairman of the Central Committee of Polish Jews, Mikołajczyk stated that the Jews did not want to remain in the new Poland due to the loss of their businesses and property, financial ruin, and physical annihilation during the war. Ultimately, the Polish government allowed the Jews, unlike other citizens, to leave the country (Friedla, 2021, p. 276).

On December 20, 1945, Dubrow, in a letter to U.S. Deputy Secretary of State Dean Acheson, speculated that the ultimate goal of the migration effort was to maximize the Jewish population in Palestine, potentially exacerbating the Arab-Jewish tensions in the Middle East and complicating U.S.-British relations (NARA, RG 59, M 1284, R. 60, img. 121). He advocated for negotiations within a month with government representatives of eastern neighbouring countries to the American occupation zone – namely, the USSR, Poland, and Czechoslovakia – to halt the mass influx of the Jews. Dubrow believed that refugees should remain in the American zone only temporarily, with the ultimate aim of returning them to their countries of origin.

The U.S. ambassador to Warsaw, Arthur Bliss Lane, shared a similar view. Vice President of the National Council of Poland, Stanisław Szwalbe, told Lane that the scale of the pogroms was exaggerated. The Polish politician suspected that the influx of the Jews into the American zone was part of an effort by the Jewish organizations to pressure the American and British governments into opening access to Palestine (NARA, RG 59, M 1284, R. 60, img. 162–163). In early January of 1946, Ambassador Lane telegraphed Washington, indicating that reports of harsh treatment of the Jews were exaggerated significantly. He found no evidence of mass persecution of the Jews in postwar Poland and noted that anti-Semitic sentiments were publicly condemned by the Polish Prime Minister Edward Osóbka-Morawski (NARA, RG 59, M 1284, R. 61, img. 6–8). However, Lane believed that changes in Poland's borders were a significant factor in accelerating Jewish migration, as many Jews came from territories east of the Curzon Line, which Poland had ceded to the USSR in agreements of July 27, 1944, and August 16, 1945 (*Dziennik Ustaw*, 1947, 35, poz. 167). Psychological factors also played a role, as Poland remained for many Jews a symbol of the Holocaust and the site of mass exterminations during the German occupation.

In addition, the ambassador noted that Jewish political and civic organizations, including the Zionist movement Poale Zion, parts of the Jewish Party of Poland, and the Central Jewish

Committee, supported mass emigration from Poland. These organizations assured migrants of a better future outside Poland. The British Communist MP Phil Piratin, after a two-day visit to Poland, reported to the ambassador that he observed no evidence of widespread anti-Semitism or violence. However, Piratin acknowledged the organized nature of the migration, attributing it to economic and psychological factors (NARA, RG 59, M 1284, R. 61, img. 20–21).

Another proponent of the theory of an organized migration movement was Frederick Morgan, the British Lieutenant General and head of UNRRA operations in Germany. On January 2, 1946, he stated at a press conference in Frankfurt that the Jewish influx from Poland showed signs of coordination by a secret, unidentified structure providing migrants with food and money (*The Evening Star*, 1946, № 37138, Jan. 8, p. 4). Morgan's views were echoed by George Meader, an advisor to the U.S. Senate Immigration Committee, who, after examining the status of European DPs in 1946, concluded that the Joint Distribution Committee (JDC) was involved in facilitating the mass exodus of the Jews from Poland and Czechoslovakia. However, General McNarney dismissed this scenario, asserting that the JDC only provided transportation to Palestine and that migration was driven by internal tensions in these countries (*The Evening Star*, 1946, № 37467, Dec. 3, p. 2).

Earlier in January of 1946, at Morgan's request, the U.S. counterintelligence conducted an investigation to determine whether the migration was organized, identify routes and documents used by illegals, and uncover the motives for migration. A Polish Jewish agent, 44-year-old Shmuel Nicinski from Zloczew near Lodz, was chosen for the operation. Nicinski travelled from Poland to Berlin's camps in the Soviet zone. According to the agent, the primary causes of the Jewish exodus were pogroms in Kraków and Bolesławiec carried out by Polish nationalists, economic boycotts of the Jews by local populations in towns, threats of property nationalization by the pro-communist government, the presence of relatives abroad, and fear of Russian pogrom traditions. Nicinski reported that refugees crossed borders using public transport with old German documents and that Zionist organizations played no significant role in the migration (NARA, RG 59, M 1284, R. 61, imgs. 109–115).

Similarly, the capabilities of the U.S. intelligence services were utilized to verify reports from the U.S. ambassador in Warsaw. Counterintelligence officers from the Berlin Regional Office of the Counter Intelligence Corps (CIC) under USFET conducted inspections and interviews with refugees, UNRRA officers, representatives of the JDC, and Berlin magistrates in two DP camps in Berlin. The interlocutors blamed the violence on supporters of the National Democratic Party ("Endecja"), which aimed at creating "Poland for the Poles". Agent Jack Eisenberg found no signs of an organized migration movement or involvement of any structure in encouraging Jewish exodus from Poland and denied the presence of the "Soviet trace" (NARA, RG 59, M 1284, R. 61, imgs. 35–37).

At the same time, Alfred Lovell, the third secretary of the U.S. embassy in Warsaw, wrote in March of 1946 about the de facto facilitation by the Warsaw authorities of Jewish emigration from Poland, which, according to the diplomat, was part of a policy aimed at creating a mono-ethnic state (NARA, RG 59, M 1284, R. 61, imgs. 222–227). Lovell noted that in addition to the Jewish associations, migration was facilitated by corrupt UNRRA employees and Soviet soldiers, who allowed the Jews to cross the border for a bottle of vodka or "sold" a spot on a military truck from Łódź to Berlin for 10,000 zlotys. While acknowledging the presence of anti-Semitic sentiments in contemporary Poland, he did not consider them decisive. Instead, the Jews were compelled to leave the country due to disillusionment with Poland's future and fear of the communist regime.

The diplomat's observations were corroborated by military intelligence. On April 3, 1946, officers of the U.S. Strategic Services Division reported to James William Riddleberger, head of the State Department's Central European Affairs Division, that the mass departure of the Jews to the West involved bribery, with average amounts reaching 900 Polish zlotys (NARA, RG 59, M 1284, R. 62, imgs. 1–2). Intelligence also indicated that the migration was supported by Zionist organizations, certain UNRRA members, the Polish Red Cross, and even members of the Czechoslovak Communist Party. Illegal migrants entered the American zone through two primary routes: the first via the Czech town of Zelená Ruda to Nuremberg and the second from Western Poland, passing through the Soviet-occupied zone and the Thuringian forests into the West.

Edwin Hartrich, Frankfurt correspondent for the "Herald Tribune", reported on the infiltration of Soviet agents alongside the Polish Jews and claimed Moscow's support for the movement. However, the U.S. Consul General in Berlin, Maurice Eltaffer, in March of 1947, disagreed with Hartrich's conclusions regarding the Soviet orchestration of the migration, though he acknowledged the presence of the Soviet agents and a high level of organization within the movement (NARA, RG 59, M 1284, R. 68, imgs. 8–12).

Conversely, representatives of the Jewish organizations entirely denied the organized nature of illegal migration from Poland. For instance, Isaac Dijour, head of the German branch of the Society for Jewish Immigrant Aid, after interviewing dozens of the Polish refugees in the American sector of Berlin in late 1945, attributed the mass influx to ethnic persecution by the Polish population and the unwillingness of Jews from annexed territories to become Soviet citizens (NARA, RG 59, M 1284, R. 60, img. 166). Meanwhile, on December 13, 1945, members of the Committee for Jewish National Liberation addressed the U.S. Secretary of War, identifying mass killings and pogroms as the root causes of the Polish Jewish migration and advocating for the "opening" of Palestine to unrestricted Jewish immigration (NARA, RG 59, M 1284, R. 61, img. 5).

It is worth noting that reports of Polish anti-Semitism towards the Jews emerged even before the onset of mass migration. In August of 1945, representatives of the World Jewish Congress informed Robert Murphy, Political Adviser in Germany, of persistent anti-Semitic and anti-Soviet sentiments among Polish refugees in displaced people camps in Sweden (NARA, RG 59, M 1284, R. 59, imgs. 47–48). By December of 1945, during the peak of migration, David Guzik, director of JDC operations in Poland, asserted that postwar Poland was experiencing "terror and coercion forcing the Jews to leave the country" (NARA, RG 59, M 1284, R. 60, imgs. 162–163). His claims were corroborated by five former Polish officers of Jewish descent who fled to the West in early 1946. These individuals cited threats, intimidation, blackmail, and murders by the Poles after the return of the Jews as the primary causes of mass flight, coupled with government inaction (NARA, RG 59, M 1284, R. 61, imgs. 229–233). Refugees reported that the main perpetrators of pogroms were underground nationalist organizations (the Home Army and National Armed Forces) and that the ideologies of anti-Semitism were propagated by Roman Dmowski, Kazimierz Kowalski, and members of the London exile government.

On January 21, 1946, Rabbi Solomon Wohlgelemler informed the U.S. chargé d'affaires in Copenhagen that the cause of the mass exodus was persistent anti-Semitic attitudes among the local population, further inflamed during the war by the Nazi propaganda (NARA, RG 59, M 1284, R. 61, imgs. 146–149). Similarly, Philip Bernstein, Advisor on Jewish Affairs to the EAC, who visited Poland from July 23–30, 1946, reported to General Dwight D. Eisenhower

that Poland was a land with centuries-old traditions of anti-Semitism, where the Jews were often labeled as “Christ-killers” (NARA, RG 59, M 1284, R. 64, 1946, imgs. 14–23).

Bernstein identified civil conflict, economic collapse, and a societal approval of postwar violence against the Jews, such as the Kielce pogrom on July 4, 1946 (in which 41 Jews were killed and 60 injured), as primary factors driving migration. He also recommended accelerating DP repatriation to make room for incoming Jewish refugees.

Meanwhile, Jacob Pat, Executive Secretary of the Jewish Labour Committee, linked the migration movement to political realities and argued that the Jews, given the opportunity to leave the USSR, were fleeing communism. He also highlighted the Polish government’s nationalization of trade, which undermined the economic foundation for local Jewish communities (NARA, RG 59, M 1284, R. 61, imgs. 20–21).

The persistence of large-scale migration necessitated a definitive U.S. policy response. In February of 1946, at meetings of the Anglo-American Palestine Commission, the U.S. representatives B. Crum and R. Grossman declared that borders would remain open to protect Jewish lives. Generals Dwight D. Eisenhower and John H. Hilldring expressed support for continuing to accept refugees under their full responsibility, a policy soon termed “Eisenhower’s program”. On March 21, 1946, American occupation commanders Generals Joseph McNarney and Mark W. Clark received orders from the State and War Departments not to close the borders (Kochavi, 2001, p. 138).

Simultaneously, G. Emerson, Director of the IRO, urged the Polish government to combat anti-Semitism, which he deemed the primary cause of migration through Czechoslovakia to American occupation zones in Germany and Austria (NARA, RG 59, M 1284, R. 60, imgs. 106–108). However, the IRO was not prepared to assume responsibility for these migrants (Huhn, 2023, p. 399). In a memorandum dated April 23, 1946, Emerson proposed solutions such as repatriation to Poland (if conditions improved), transoceanic migration to Canada, Australia, and South America, or creating large group settlements in Palestine (NARA, RG 59, M 1284, R. 61, imgs. 193–207).

By 1947, reports from the Joint annual review highlighted improvements in the situation of Polish Jews, including stabilization of migration, a willingness among the Jews to remain in the country, and the establishment of a government office – the Commissioner for the Rehabilitation of Polish Jews (NARA, RG 59, M 1284, R. 69, imgs. 89–99). However, the U.S. vigilance regarding Polish Jewish migration remained high. In August of 1946, the State Department requested updates from the U.S. embassies in Warsaw and Vienna. Ambassador John Erhardt in Vienna reported no significant increase in anti-Semitic sentiment due to the influx of the Polish Jewish refugees, noting that most migrants used Austria as a transit point to Palestine (NARA, RG 59, M 1284, R. 64, img. 4). The majority of migrants used Austria as a bridge for further movement to Palestine. Meanwhile, Arthur Lane noted that as of September 30, 1946, approximately 100,000 Jews remained in Poland. At the same time, he believed that the mass influx was not yet over, as a significant portion of the Polish Jews had concentrated along the western border – 62,000 individuals (NARA, RG 59, M 1284, R. 64, imgs. 53–54).

In the summer of 1946, General D. McNarney proposed to the U.S. State Department to close the borders to Jewish infiltrators starting September 1, 1946. However, he soon abandoned this initiative (Hilton, 2001, pp. 333–334). On April 21, 1947 the U.S. War Department issued an order to halt the reception and maintenance of individuals in camps who had arrived in the occupation zones after the publication of the document (Kochavi,

2001. p. 143). In practice, this decision was scarcely implemented, as the border remained open, and the Joint Distribution Committee took over the funding for new refugees. This allowed for the support of 70,000 individuals over the next two years. Overall, between 1946 and 1950, the Joint provided Jewish displaced people with 79 million pounds of food and 10 million pounds of clothing (Sapir, 1949, p. 2).

It is worth noting that several American public organizations, such as the American Federation of Polish Jews, the Central Committee of the Jewish Bund in Poland, and the Jewish Labor Committee, launched a campaign to support Jewish refugees from Poland and called for the allocation of \$100 million from the U.S. federal budget (NARA, RG 59, M 1284, R. 60, imgs. 32–33). At the same time, FBI informants reported that the American Association of Polish Jews, which urged the President and Congress to accept 100,000 Jews instead of German scientists, had pro-communist tendencies (NARA, RG 59, M 1284, R. 68, imgs. 79–86). According to the informant, the organization's leaders echoed statements by Soviet representatives at the United Nations regarding the need for the forced repatriation of most displaced persons to the East. Additionally, according to FBI data, the leaders of the Jewish organization Yidishe Kolonization Orbayter (ICOR) maintained close ties with the Soviet embassy, organizing joint events, raising funds to aid Jewish children in the USSR, and disseminating materials opposing the “defamation” of Soviet policies by the American media (NARA, RG 59, M 1284, R. 58, imgs. 90–96).

The influx of Polish Jews began to stabilize after the countries of the Eastern Bloc, in response to the mass westward migration, implemented border closures. As a result of migration from Poland and Czechoslovakia, the number of Jews in the western sectors of Germany reached 69,739 by February of 1946 (46,084 of them in the American zone). By June 1946, this number had increased to 105,927 (71,963 in the American zone). In addition to the 86,000 Jewish migrants who entered Germany illegally, 8,000 individuals reached Austria, and 16,000 moved to Italy (Holmgren, 2020, p. 239). Following the stabilization of migration flows, by September 30, 1947, the total number of Jewish refugees and displaced people (DPs) in Germany, Austria, and Italy amounted to 247,000, including 157,000 in the American zone of Germany and 20,000 in Austria. Notably, 167,522 Jews in these three countries were receiving assistance from the United Nations Relief and Rehabilitation Administration (UNRRA), 122,313 of whom were of Polish origin (*PCIRO News Bulletin*, 1947, № 6, p. 3).

A significant development in improving conditions for the Jews in DP camps was the establishment of a specialized position within the U.S. military. On August 22, 1945, General Dwight D. Eisenhower appointed Chaplain Lieutenant Colonel Judah Nadich as the first Advisor on Jewish Affairs to the U.S. military command in Germany (Nadich, 1953, p. 16). In October of 1945, he was succeeded by Simon H. Rifkind, a former New York judge and vice president of the New York City Board of Higher Education. Rifkind submitted a detailed report on his activities in April of 1946, a copy of which was presented to President Harry S. Truman (NARA, RG 59, M 1284, R. 62, imgs. 7–14). He noted that the majority of Jewish DPs in the American zone originated from Poland and the Baltic states. To improve the conditions of camp residents, Rifkind recommended increasing caloric food intake, expanding religious, educational, and vocational programs, and facilitating access to the German labour market. Moreover, he emphasized that addressing the issue of Jewish DPs could not be fully achieved without resolving the question of Palestine's future.

During his tenure, Rifkind encountered a controversial incident in the American occupation zone. On March 29, 1946, a German police raid in Jewish DP camps aimed

at combating illegal trade triggered a brief uprising that resulted in the death of one camp resident. Congressman Emanuel Celler demanded sanctions against the German police, accusing them of using Nazi-era methods. In response, on March 30, 1946, General Joseph T. McNarney issued an order barring German police from entering Jewish camps and stipulating that searches and arrests would fall under the jurisdiction of the U.S. occupation authorities (*The Sunday Star*, 1946, № 2139 (37220), March 31, p. 6).

In May of 1946, Rifkind was succeeded by Rabbi Philip Bernstein, a spiritual leader of the Reform synagogue Brit Kodesh in Rochester, New York, and the executive director of the Committee on Religious Activities in the Armed Forces and Navy of the National Jewish Welfare Board. In February 1947 report, Bernstein noted that the Jewish population in the American zone of Germany had reached 155,000, mainly due to new arrivals (Genizi, 1994, p. 139). From August 1947 to January 1948, Louis E. Levinthal, Pennsylvania Supreme Court justice and former president of the Zionist Organization of America, held the position.

On January 20, 1948, Professor William Haber of the University of Michigan assumed the role of Advisor on Jewish Affairs. In his report, Haber noted that by early 1948, there were 130,000 Jewish DPs in the American zone of Germany and 22,000 in Austria. By October 1948, 22,000 DPs had left the American zones, motivated in large part by the proclamation of Israel's independence. However, Haber recommended relaxing the U.S. immigration legislation to facilitate the closure of all Jewish DP camps by 1950. He also opposed the potential transfer of camp administration to German authorities (NARA, RG 59, S. IRO and DPC, I. DPC, B. 8, 1948, n/a).

On October 20, 1948, Haber was succeeded by Harry Greenstein, who had previously managed UNRRA programs in Greece, Albania, and Yugoslavia. Greenstein's final report highlighted significant progress in resolving the Jewish DP issue, attributing it to the establishment of the State of Israel and the passage of the Displaced Persons Act. Between January 1 and October 15, 1949, 54,700 individuals were resettled from the American zone in Germany and 12,500 from the Austrian zone. By then, only 43,000 Jewish DPs remained in both American zones (NARA, RG 59, S. IRO and DPC, I. DPC, B. 2, 1949, n/a). Additionally, efforts to consolidate DP camps succeeded in reducing their number in the American zone of Germany from 48 to 10, and in Austria from 13 to 7. Another notable achievement included lifting restrictions on the export of personal property by camp residents and adopting measures for future financial compensation for Nazi victims. In October of 1949, Major Abraham Hyman became the last Advisor on Jewish Affairs, with the position abolished on December 31, 1949.

In Austria, the U.S. occupation authorities adopted a slightly different approach. Following a meeting with Vienna's Jewish community leaders Adolf David Brill and Bernhard Breiver, Four-Star General Mark W. Clark established a special committee on December 7, 1945, led by Brigadier General Lester Flory (NARA, RG 59, M 1284, R. 60, imgs. 129–131). This committee, comprising the U.S. military officers in Austria and U.S. embassy staff, focused on improving living conditions and food supplies for Jews in DP camps.

Conclusions. The illegal migration of Jewish refugees from Poland to the American occupation zone in Europe in 1945 – 1948 represents a multifaceted phenomenon reflecting the complexity of the post-war migration crisis. Key drivers of this movement included anti-Semitism, economic instability, and fear of the communist regime. Despite Allied efforts to regulate population transfers, many migrants exploited administrative loopholes to cross borders. American authorities took specific steps to address the influx, such as

establishing separate camps for migrants, engaging in diplomatic negotiations with other occupying powers, and temporarily tolerating illegal migration on humanitarian grounds. At the same time, the broader political implications of this migration influenced the U.S. policy on Palestine, where the refugee crisis became a significant factor in discussions about the establishment of the Jewish state. This migration flow not only emphasized the urgency of resolving the Palestinian question but also highlighted the role of displaced people as a catalyst for international policy shifts. Overall, this study makes a substantial contribution to understanding the history of post-war migration processes, the political strategies accompanying them, and their lasting impact on the geopolitical landscape.

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MANIFESTATIONS OF THE CONFLICT BETWEEN THE MONK COMMUNITY OF THE HLYNSKA HERMITAGE WITH THE SOVIET AUTHORITY AT THE END OF THE 1950s – THE BEGINNING OF THE 1960s.

Abstract. *The purpose* of the article is to clarify the causes and nature of the conflict between the monastic community of the Hlynska Hermitage and the Soviet authorities at the end of the 1950s and the beginning of the 1960s, to study the forms of resistance of the monastic community and the reaction to them by state authorities, and to determine the consequences of this confrontation. **The research methodology** is based on the principles of objectivity and systematicity. To achieve the goal and objectives, general scientific methods have been used – analysis, synthesis, generalization, induction, deduction, as well as special methods of historical research – classification and criticism of sources, problem-chronological, comparative historical. **The scientific novelty** consists in the fact that for the first time, the manifestations of the conflict between the monastic community of the Hlynska Hermitage and the Soviet authorities on the eve of the monastery's closure have become the object of a separate scientific study. **Conclusions.** The monastic community of the Hlynska Hermitage used passive and active forms of resistance. Passive forms include assistance to pilgrims, provision of food, lodging, and failure to take measures recommended by the authorities to stop such assistance. A form of active resistance was the sabotage of Soviet elections, the refusal of individual monks to commemorate the Soviet regime during church services. This was prompted by an internal ethical and spiritual call, since praying for a godless regime that actively destroyed the Church and closed monasteries and temples seemed contradictory. The monks' resistance was spontaneous and unorganized, but in terms of ideological significance it was of serious importance to the authorities.

The authorities actively responded to any attempts by the monastic community to resist the established order; using various means of influence – from formal control to pressure and direct persecution of dissenting monks. The confrontation between the monastic community of the Hlynska Hermitage and the Soviet authorities had significant consequences for the monastic community, as a significant part of the monks were expelled, and the monastery itself was under constant surveillance.

Key words: Orthodox Church, monastery, monks, clergy, Soviet government, repressions, Sumy region.

ПРОЯВИ КОНФЛІКТУ ЧЕРНЕЧОЇ ГРОМАДИ ГЛИНСЬКОЇ ПУСТИНИ ІЗ РАДЯНСЬКОЮ ВЛАДОЮ В КІНЦІ 1950 – НА ПОЧАТКУ 1960-х рр.

Анотація. Метою статті є з'ясування причин та характеру конфлікту між чернечою громадою Глинської пустині та радянською владою у кінці 1950 – на початку 1960-х років, вивчення форм спротиву чернечої громади та реакцію на них з боку державних органів, визначення наслідків цього протистояння. **Методологія дослідження** базується на дотриманні принципів об'єктивності та системності. Для реалізації мети і поставлених завдань використано загальнонаукові методи – аналізу, синтезу, узагальнення, індукції, дедуції, а також спеціальні методи історичного дослідження – класифікації та критики джерел, проблемно-хронологічний, порівняльно-історичний. **Наукова новизна** полягає у тому, що вперше прояви конфлікту чернечої громади Глинської пустині із радянською владою напередодні закриття монастиря стали об'єктом окремого наукового дослідження. **Висновки.** Чернеча громада Глинської пустині використовувала пасивні й активні форми спротиву. До пасивних відносимо допомогу паломникам, забезпечення харчуванням, ночівлею та невиконання рекомендованих владою заходів, спрямованих на припинення такої допомоги. Формою активного спротиву було саботування радянських виборів, відмова окремих монахів від поминання радянської влади на богослужіннях. Це було викликано внутрішнім етичним і духовним покликом, оскільки молитися за безбожну владу, яка активно руйнувала Церкву, закривала монастирі та храми, здавалося суперечливим. Спротив ченців був спонтанним і не організованим, але за ідеологічною значимістю мав серйозне значення для влади.

Влада активно реагувала на будь-які спроби чернецтва протистояти встановленим порядкам, використовуючи різні засоби впливу – від формального контролю до тиску та прямого переслідування незгодних ченців. Протистояння між чернечою громадою Глинської пустині та радянською владою мало суттєві наслідки для монастирської братії, адже значну частину монахів було виключено, а сам монастир перебував під постійним наглядом.

Ключові слова: Православна церква, монастир, ченці, духовенство, радянська влада, репресії, Сумщина.

Problem Statement. At the end of the 1950s and the beginning of the 1960s in the USSR, despite declared liberalization reforms, the authorities did not stop their strict control over religious organizations, but rather improved the methods of restricting their activities. This trend encompassed political, economic, and ideological mechanisms of pressure, and also unfolded at the level of official campaigns against religion, which influenced a religious life of citizens and organizations significantly, in particular monasteries and monastic communities.

The Hlynska Hermitage, as one of the spiritual centres of Orthodoxy in Ukraine, was an important centre of a religious life. It remained a significant place of pilgrimage, being one of the centres of a spiritual support for believers, giving them the opportunity to confess and receive advice by a spiritual father. However, its activities during this period were subject to significant pressure from the authorities. The monastic community of the Hlynska Hermitage, which had long historical and spiritual traditions, found itself under pressure from restrictive measures aimed at liquidating the monastery.

The relevance of the research topic is associated with the desire to understand the conflict dynamics, which reflects the nature of relations between the Soviet state and religious communities, as well as the consequences of this conflict for both religious life of the Ukrainian Exarchate and monastic community. It is important to note that despite the desire of the Soviet authorities for a complete atheization of society, monasteries remained an important source of a religious stability and resistance, and also preserved their cultural and spiritual traditions. Studying the conflict between the monastic community of the Hlynska Hermitage and the Soviet authorities allows us not only to better understand the nature of Soviet policy towards

religion, but also to analyze how religious communities were able to preserve their identity and survive under constant pressure. Thus, research on this issue will contribute to a better understanding of social and spiritual processes in the Soviet society and the role of religious communities in maintaining moral stability in the context of atheistic politics.

Review of Recent Research and Publications. The history of state-church relations and the Orthodox Church in Ukraine in the 20th century occupies an important place in modern historiography. Given this, there is a significant historiographical basis of the issue. Despite a massive historiographical output, there is no special study on the conflict between the monastic community of the Hlynska Hermitage and the Soviet authorities. Among the total number of historical studies that consider the peculiarities of a religious policy and the position of the Orthodox Church in Ukraine in the second half of the 20th century, it is necessary to single out the monograph by V. Pashchenko (Pashchenko, 2005). Within narrower chronological limits, the issue was studied by N. Schlikhta (Shlikhta, 2011). Yu. Danyliuk and O. Bazhan analyzed the opposition movement in Ukraine in the second half of the 20th century, in particular opposition sentiments and their manifestations in the environment of the Ukrainian Exarchate of the Russian Orthodox Church (Danyliuk, & Bazhan, 2000). The collective monograph of the Institute of History of Ukraine of the NAS of Ukraine on the history of everyday life dedicated to the period of late Stalinism and the Khrushchev era contains a separate section dedicated to monastic communities (Danylenko, 2015). State-church relations in the USSR in 1939 – 1964 were analyzed by M. Shkarovskyi (1999). Certain aspects of the situation of the Orthodox clergy, in particular in Sumy region, were studied by V. Olitskyi (Olitskyi, 2024; Olitskyi, & Podriez, 2022). The issues of state-church relations and Soviet anti-religious policy are covered in articles by I. Danylets, V. Mishchanyn, M. Palinchak, and V. Bokoch (Danylets, & Mishchanyn, 2022; Palinchak, & Bokoch, 2021). The Ukrainian resistance to the Soviet anti-religious policies in the 1960s and 1970s was studied by N. Kindrachuk and V. Vasylichuk (Kindrachuk, & Vasylichuk, 2022). Some theoretical and methodological aspects are contained in the work of Mykola Haliv and Vasyl Ilnytskyi (Haliv, & Ilnytskyi, 2023).

The purpose of the article is to clarify the causes and nature of the conflict between the monastic community of the Hlynska Hermitage and the Soviet authorities at the end of the 1950s and the beginning of the 1960s, to study the forms of resistance of the monastic community and the reaction to them by state authorities, and to determine the consequences of this confrontation.

Results of the Research. In 1940, there were 64 Orthodox monasteries and hermitages in the USSR. During the German occupation, a process of revival of a religious life took place, as a result of which their number increased to 101. After World War II, despite the establishment of state-church relations, the number of religious communities decreased. As a result of such events, from 1947 to 1957, 38 monasteries were liquidated by means of unification in the USSR. If in 1946 there were 101 monasteries operating in the Soviet Union, then in 1948 there were 85, in 1950 – 75 and 4,787 monks, by 1957 there were 63 monasteries operating and 4,601 monks. All decisions to liquidation of monasteries were made by the ruling hierarchs under pressure from the ROCh (Russian Orthodox Church) authorities, which gave the impression that the government was not involved in the process. This approach contributed to the fact that these measures did not cause mass outrage among believers and the church hierarchy. In 1959, out of 63 monasteries of the Russian Orthodox Church, 40 belonged to the Ukrainian Exarchate. However, under conditions of the growing anti-religious campaign, the current pace of liquidation did not satisfy the Soviet regime.

On April 7, 1959, the Council of Ministers of the USSR adopted a secret resolution “On the Reduction of Monasteries and Hermitages in the USSR,” which provided for the liquidation of 22 monasteries and 7 hermitages during the period of 1959 – 1960, of which 18 were in the Ukrainian SSR: 4 for men and 14 for women. Thus, it was planned to close almost half of the existing monasteries in less than two years. The Council for the Affairs of the Russian Orthodox Church under the Council of Ministers of the USSR, which developed this resolution, initially suggested closing all planned monasteries in Ukraine during the summer of 1959. The Council of Ministers of the Ukrainian SSR supported this idea in general, but suggested implementing it gradually, because a simultaneous closure of half of the existing monasteries could cause unrest both within the Russian Orthodox Church and abroad. As a result, the implementation period was extended by a year. Patriarch Oleksiy was forced to agree to the reduction of monasteries and hermitages in accordance with the list on April 2, 1959, under pressure by state authorities. On April 4, 1953, the Council for the Affairs of the Russian Orthodox Church received a letter from the Patriarch in which he noted that “under conditions where there is a need to continue reducing the number of monasteries, as was the case in previous ones before 1958, the reduction plan determined by the Council, is the most painless solution to this issue... a painless nature of the plan lies mainly in the fact that it is proposed to reduce not so many of the total number of existing monasteries... the closure will not be carried out immediately, but gradually over the coming years”. Thus, the only thing the hierarch could do for his flock was to request a gradual implementation of the plan so that it would be as painless as possible (CSAHAAU, f. 4648, d. 3, c. 227, pp. 11–17). As a result of the implementation of this resolution, by the beginning of 1965, only nine monasteries remained operating in Ukraine, of which two were male and seven female (Danyliuk, & Bazhan, 2000, p. 231).

The Nativity-Virgin Mary Hlynska Hermitage, founded in the 16th century, operated in Sumy region. With the establishment of the Bolshevik power, the monastery was closed in 1921. It resumed its activities in October of 1942, having a significant impact on the religious situation not only in the region but also outside the Republic. The monastery was regularly visited by pilgrims from various regions of the USSR. At the end of the 1950s, the number of monks reached about 60 people, of whom 38 were over 55 years old. At the same time, the monastic community was constantly replenished by young monks: 8 people were under 30 years old, another 7 were between the ages of 31 and 40 (SASR, f. P-2196, d. 7a, c. 5, pp. 60–62).

Since 1959, the Commissioner for the Affairs of the Russian Orthodox Church in Sumy region has constantly focused on this monastery. One of the most important tasks that the local authorities tried to solve in relation to the monastery even before its closure was to limit the appearance of new monks and reduce the number of pilgrims to the monastery in order to reduce the monastery’s influence on the religiosity of the population. Accordingly, the issues were constantly raised that would contribute to their implementation. Some of them were fundamental to the existence of the monastery, as they concerned the very essence of a monastic service, the main goal of which was the pursuit of perfection of life through devotion to a prayer and repentance, and through it to service to one’s neighbour and the performance of mercy acts. In addition, an important task of the monastic community existence was the preaching of Holy Scripture, preservation and spread of the faith, and the instruction of believers.

In a report on the Hlynska monastery in 1959, the regional commissioner for the affairs of the ROCh, Ye. Valakhov, especially emphasized that the monks, through personal contacts

with the population, carried out significant work to attract believers to pilgrimage. Believers from various cities and regions of the USSR came to the service. Near Lokot railway station, the monastery maintained a separate room for visiting pilgrims and organized meals. After the ban on maintenance of this premises, the monks used monastery transport to meet pilgrims, who were provided with free overnight accommodation and two meals a day at the monastery. In some cases, preschool and school-age children, especially from surrounding villages, visited the monastery with their parents. By agreement between the regional commissioner and the leadership of the Ministry for Internal Affairs department, in 1959, police officers checked the passport regime in the monastery several times, which made it possible to get rid of people undesirable to the commissioner. The abbot of the monastery, Archimandrite Theogen, received repeated warnings from the commissioner about the inadmissibility of such a situation. After the abbot ignored these warnings, the commissioner demanded through the Archbishop of Chernihiv and Nizhyn, head of Sumy eparchy, Andriy (Sukhenko), to stop this practice. The monastery management complied with the request, but with a minimal harm to the faithful – the meals for pilgrims in the dining room were cancelled, but the food for them was delivered directly to the premises where the faithful were staying. All these factors contributed to the conflict escalation between the monastic community and the authorities (SASR, f. P-2196, d. 7a, c. 5, pp. 7–10, 59–60; c. 13, pp. 37–38).

A kind of apogee of the conflict between the monks and the Soviet authorities was the refusal of some monks to commemorate the latter during divine services. In the Orthodox Church, during divine services, in particular the liturgy, there is a rite of commemoration in addition to the religious authority, the state. In the tradition of Kyivan Orthodoxy, under different historical conditions, two forms of such commemoration developed – commemoration of the head of state by name or simply a prayer for the government bodies. Under the Soviet anti-theocratic regime, a situation arose when the Russian Orthodox Church was forced to pray for the government, which was building a society of militant atheism and trying to destroy the Church. This led to a certain transformation of the commemoration form. The commemoration of the government bodies in litanies became general – “for our God-preserved country, its government and army”. It was performed in a peaceful and solemn litanie, and the commemoration of government was completely excluded from the priest’s speech at the Great Entrance (Horbyk, 2016; Pravoslavnyi, 1986, pp. 65, 72).

In June of 1960, the monks of the Nativity of the Mother of God Hlynska Hermitage, Hieromonk Ambrose (Pechienv) and Hierodeacon Isaiah (Korovai), refused to commemorate the Soviet government during divine services. On June 4, 1960, at All-Night Vigil, Hierodeacon Isaiah stopped commemorating the government during the litanies. Instead of the statutory request, he recited “we still pray for our God-protected country and for its salvation”. The abbot of the monastery, Archimandrite Theogen, immediately spoke out against such actions, noting that the monk had done the wrong thing. To the abbot’s remark, Hierodeacon Isaiah replied, “The authorities do not need prayer and I will not commemorate them”. The monks argued their refusal by saying that one cannot pray for a godless authorities. After the service, Hieromonk Ambrose objected to the abbot and treasurer who tried to rectify the situation. He stated that “the Church has no right to pray for those who do not recognize the power of the Lord, but reject it” (SASR, f. P-2196, d. 12, c. 53, pp. 5–6).

It can be argued that the monks committed these actions without the consent of the monastery leadership. Based on the explanatory note of Abbot Modest addressed to the Commissioner for the Affairs of the ROCh of Sumy Region, during the incident the abbot

immediately reacted to it and was somewhat confused, consulting with Abbot Modest on how to act in this situation. The latter advised to remove the monks from performing divine services and to report to the hierarch. On June 7, on the instructions of the abbot, Abbot Modest personally reported to Archbishop Andriy, who wanted to meet with the monks in person. The abbot, through Abbot Modest, asked the bishop, if the monks had a meeting with him, to influence them and convince them that they were wrong in this case (SASR, f. P-2196, d. 12, c. 53, pp. 2–4).

The regional commissioner for the ROCh affairs had a conversation with Bishop Andriy on this matter and recommended that he should summon the dissenting monks to him (SASR, f. P-2196, d. 7a, c. 13, pp. 39). A few days later, this meeting took place in Sumy. Once again the monks stated that they would not pray for the current government, because they believe that “based on the Holy Scriptures and the teachings of the Fathers of the Church, it is impossible to pray for the government that destroys the Christian faith and liquidates churches”. Additionally, the monks argued their position by referring to the book of Archpriest Kalnev (unfortunately, it was not possible to determine which book was ment). The Bishop tried to convince them that, according to the instructions of the Apostle Paul, it is necessary to pray for all authorities, regardless of how they treat the Church. These arguments did not yield any results (SASR, f. P-2196, d. 12, c. 53, pp. 2–3, 7). In March of 1961, while examining the monastery books, in the main building the regional commissioner discovered the book published in Canada by missionary V. Konovalov, “The Attitude of a Christian to Soviet Power,” which could also be used as one of the arguments in favour of this act (SASR, f. P-2196, d. 12, c. 55, pp. 37–38).

On July 8, 1960, Bishop Andriy visited the Hlynska Hermitage, and the next day, in the presence of the abbot, Archimandrite Theogen, his deputy, Abbot Modest, and the confessors of the monastery, Abbots Andronikos and Seraphim, he met with these monks. The conversation took place with each one separately. Despite the arguments of such authoritative figures, Hieromonk Ambrose and Hierodeacon Isaiah still remained in their positions. After spiritual conversations and persuasions did not yield any results, the ruling hierarch’s last argument was that in this case they would be forced to leave the monastery. In response, both monks declared, “Do with us whatever you want, but we will not pray for this government”. Hierodeacon Isaiah added, “Even if they shoot me, I will not pray for Mykyta, who closes the churches”. Having failed at achieving concessions from the dissidents, Archbishop Andriy banned both from performing religious services and sent a report on the incident to the Commissioner for the Affairs of the Russian Orthodox Church. According to the Commissioner, the decision to evict the opposition-minded monks from the monastery was made by the bishop in agreement with him. After the monastery was informed of this decision, on July 13, Hieromonk Ambrose came to Archbishop Andriy in Chernihiv with a letter from the abbot of the Hlynska Hermitage, in which he asked, in view of the repentance of the monks Ambrose and Isaiah, to forgive them and not to bring any case against them. In response, the bishop stated that this was a very serious issue that had already gained resonance, and accordingly he was unable to stop the matter.

On July 19, both monks left the monastery. On August 12, the new abbot, Abbot Modest, wrote a report to the ruling bishop with a request to exclude from the lists of the Nativity of the Virgin Mary Hlynska Hermitage those who had left the monastery without permission: Hieromonk Ambrose, Hierodeacon Isaiah, and novice Mykola Melnyk. The Bishop approved this report and banned them from performing religious services. The Commissioner reported

the anti-Soviet statements of these monks to the KGB in Sumy region. Archimandrite Theogen's letter asking for forgiveness for Hieromonk Ambrose and Hierodeacon Isaiah was used by the commissioner as one of the arguments for replacing the abbot of the Hlynska Hermitage. Archimandrite Theogen was accused of not punishing these monks, but rather trying to protect them (SASR, f. P-2196, d. 12, c. 53, pp. 2–4, 11; d. 7a, c. 13, p. 39).

Despite the fact that none of the monks supported this action openly, we should say that at least some of them shared such actions. In a report addressed to the commissioner, Archbishop Andriy mentions that almost all the monastery monks with whom he had a conversation condemned the monks' actions. The regional commissioner for the ROCh, describing this event in his report, stated that in the monastery, individual hostile monks made judgments and slander against the Soviet reality (SASR, f. P-2196, d. 12, c. 53, p. 3, 11; d. 7a, c. 13, pp. 38). During the period of 1958 – 1959, 8 people were expelled from the monastery, who, according to the conclusion of the regional commissioner, were "hostile and made judgments" (SASR, f. P-2196, d. 7a, c. 5, p. 61). Given such statements, we should say that some of the monks expressed their dissatisfaction with the actions of the Soviet authorities, and at least in a conversation with the bishop, shared the position of not commemorating it, while some sympathizers, aware of all the risks, could not declare their views.

The issue of Archbishop Andriy's position on this fact remains open. On the one hand, we see his participation in overcoming impermanence, and on the other, given the statements of the regional commissioner, the question arises as to how sincere and comprehensive this participation was. The bishop, as the head of the hierarchy, was supposed to care for its well-being, including the proper conditions for the monastery to exist. He realized that this action could not be ignored or not responded to, because in the context of growing anti-religious pressure, it served as a good pretext for closing the monastery and criminally prosecuting the monks, and in the case of ignoring it, for his imprisonment as well. Throughout the time when he was required to remove objectionable monks from the monastery or priests from parishes, in every way the Bishop tried to avoid these steps and took them only after significant pressure from the Commissioner for the Affairs of the ROCh. In such cases, Bishop Andriy, in conversations with believers and even in official correspondence with the patriarchate and deacons, reported that the expulsion of a particular monk from the monastery took place on the instructions of the authorized person, while he had a different view on this issue (SASR, f. P-2196, d. 7a, c. 21, pp. 10; c. 13, p. 78).

On the eve of the closure of the Hlynska Hermitage in 1961, Ye. Valakhov compiled a list of 15 monks who were subject to expulsion from the monastery, indicating the reason. Among the total number of different reasons, 5 can be characterized as a manifestation of conflict with the authorities, which made it possible to regard these monks as hostile to the Soviet power. Thus, Hieromonk Vissarion (Hordienko) was accused of spoiling the ballot in the elections of December 18, 1960, Hierodeacon Pavlin (Mishchenko) of refusing to participate in the same elections, Hieromonk Vlasiy (Sumyn) of healing the demon-possessed and baptizing children in a cell, Monk Ivan (Sehyda) of storing and distributing anti-Soviet literature, Hierodeacon Ilarion (Prykhodko) of supporting the views of Hieromonk Ambrose and Hierodeacon Isaiah (SASR, f. P-2196, d. 12, c. 55, pp. 21–22).

The practice of spreading various rumors and gossip among the population to justify pressure became widespread. One of them was the imposition of the idea that, taking advantage of the monastery's secluded location, its inhabitants were engaged in espionage (Danylenko, 2015, p. 606). One of the means of mass propaganda that was actively used

for this purpose was the press. On May 16, 1961, in order to discredit the monks, an article was published in the Sumy regional newspaper “Leninska Pravda”, which was supposed to show the general public the anti-Soviet sentiments among the monks and contribute to the formation of an opinion about the need to close the monastery (Savchenko, 1961, p. 4).

On July 13, 1961, Archbishop Andriy issued an order to close the Nativity of the Mother of God the Hlynska Monastery, in which he noted that the monastery was being closed in accordance with the blessing of His Holiness the Patriarch, with the knowledge and consent of the Exarch of Ukraine, the consent of the ruling bishop, and also taking into account the request of the local authorities. The monks of the monastery were given the right to receive all their personal belongings and food for the first time. The monks were provided with money in advance. They were given the opportunity to leave for their relatives and acquaintances, and to get a civilian job. Elderly monks were offered to move to nursing homes. The monks were allowed to leave in groups of two or three immediately after determining where they would move. Religious property and the monastery library were transferred for safekeeping to the St. Anastasia Church in the town of Hlukhiv, the rest of the property to the house for the disabled in Sosnivka, which was located next to the monastery. In order for the closure to take place without any kind of excesses, the father abbot and the monks were warned to behave consciously and remember that they were monks and a vow of obedience, and the closure of the monastery was approved and blessed by the church authorities (SASR, f. P-2196, d. 12, c. 55, pp. 67–68).

It can be argued that the closure of the Hlynska Hermitage was the culmination and resolution of the conflict between the monks the Soviet authorities. Thus, the Soviet regime, on the one hand, carried out its plan to reduce the number of monasteries, and on the other, got rid of the unwelcome monastic community with which it had had a long-standing conflict. Considering that the decision of the bishops to close the monasteries was only a method of formalizing the decisions of the authorities and was signed under significant pressure from them, it should be noted that the order of Archbishop Andriy was also formal in nature. At the same time, it should be noted that he knew in advance about the plans to close this monastery and informed its leadership about it. Six months before the closure, all the money was withdrawn from the bank account and distributed to the monks. The most valuable things and materials were taken out of the monastery (SASR, f. P-2196, d. 12, c. 54, p. 35). Owing to such actions, it was possible not only to preserve the most valuable monastery property, but most importantly, to provide the monks with the means of subsistence after their eviction from the monastery, which was specifically stated in the order on the closure. These actions of the bishop were not forgiven by the Soviet regime; they became one of the charges during his criminal imprisonment at the end of 1961. Thus, Bishop Andriy, shortly after the closure of the Nativity of the Virgin Mary Hlynska Hermitage, was punished for opposing the authorities' closure of churches and monasteries.

Conclusions. The manifestations of the conflict between the monastic community of the Hlynska Hermitage and the Soviet power at the end of the 1950s and the beginning of the 1960s testify to deep contradictions between the atheistic ideology of the Soviet state and the spiritual needs of religious communities, as well as to a significant place and authority of monasteries in the lives of believers, which remained strongholds of spiritual resistance to the regime. The Hlynska Hermitage became an example of how, even under strong pressure, the monks tried to preserve their traditions, fulfill religious duties, and resist atheistic policies that sought to oust the Church from public life.

The monastic community of the Hlynska Hermitage used passive and active forms of resistance. Passive forms include assistance to pilgrims, provision of food, lodging, and failure to take measures recommended by the authorities to stop such assistance. A form of active resistance was the sabotage of Soviet elections, the refusal of individual monks to commemorate the Soviet regime during church services. This was prompted by an internal ethical and spiritual call, since praying for a godless regime that actively destroyed the Church and closed monasteries and temples seemed contradictory. The monks' resistance was spontaneous and unorganized, but in terms of ideological significance it was of serious importance to the authorities.

The authorities actively responded to any attempts by the monastic community to resist the established order, using various means of influence – from formal control to pressure and direct persecution of dissenting monks. The confrontation between the monastic community of the Hlynska Hermitage and the Soviet authorities had significant consequences for the monastic community, as a significant part of the monks were expelled, and the monastery itself was under constant surveillance.

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**ROMAN CATHOLIC CHURCH AND POLISH SOCIETY IN THE SECOND HALF
OF THE 20th TO THE BEGINNING OF THE 21st CENTURY:
CULTURAL RELIGIOUS ASPECT**

Abstract. Among the pressing issues of modern Polish society development, cultural and religious problems hold a prominent place. Traditionally, the cultural and religious realm has been the field of activity for the Roman Catholic clergy, which has achieved significant success in this domain. This article focuses on the study of the cultural and religious activities of the Roman Catholic Church (RCC) in the Polish society from the second half of the 20th to the beginning of the 21st century. **The research methodology** is grounded in the principles of historicism, objectivity, systematicity, and scientific rigor, as well as the utilization of general scientific methods such as analysis and synthesis, induction and deduction, comparison, and generalization, on a sociocultural approach. During the processing of the source base, methods of historical cultural and analytical analysis, criticism, and periodization, classification and typologization have been applied. **The scientific novelty** consists in the fact that a new conceptual vision

of the cultural and religious activities of the RCC in the Polish society in the second half of the 20th – to the beginning of the 21st centuries has been proposed, its main directions have been outlined, and its impact on society and on the rise of the national consciousness of the Poles has been characterized. **Conclusions.** Throughout the second half of the 20th to the beginning of the 21st century, the RCC served as a bearer of national consciousness, preserving language, cultural traditions, and historical memory. The cultural and religious influence of the church on Polish society was significant in shaping moral values. Its influence on education, art, and public behaviour contributed to the maintenance of traditional values and the establishment of ethical norms. Religious education, the Roman Catholic press, became key factors in the cultural and religious life of the Polish society. The RCC adapted to new social realities. It maintained its position in the spiritual life of society while also seeking answers to new challenges and aiming at becoming a modern centre of spirituality and moral improvement. It is argued that amidst the social changes at the beginning of the 21st century, brought about by the fall of the communist regime, there was also a decline in popular support for the church.

Key words: Roman Catholic Church, Polish society, Republic of Poland, cultural religious activity, religious education.

РИМО-КАТОЛИЦЬКА ЦЕРКВА І ПОЛЬСЬКЕ СУСПІЛЬСТВО В ДРУГІЙ ПОЛОВИНІ ХХ – ПОЧАТКУ ХХІ ст.: КУЛЬТУРНО-РЕЛІГІЙНИЙ АСПЕКТ

Анотація. З-поміж актуальних питань розвитку сучасного польського суспільства чільне місце посідають культурно-релігійні проблеми. Традиційно культурно-релігійна царина була полем діяльності римо-католицького духовенства, яке досягло значних успіхів у цій площині. Стаття присвячена дослідженню культурно-релігійної діяльності Римо-католицької церкви (РКЦ) в польському суспільстві другої половини ХХ – початку ХХІ ст. **Методологія дослідження** ґрунтується на принципах історизму, об'єктивності, системності та науковості, а також на використанні загальнонаукових методів – аналізу і синтезу, індукції й дедукції, порівняння та узагальнення, на соціокультурному підході. Під час опрацювання джерельної бази застосовувались методи історико-культурного і аналітичного аналізу, критики та періодизації, класифікації і типологізації та ін. **Наукова новизна** полягає у тому, що запропоновано нове концептуальне бачення культурно-релігійної діяльності РКЦ в Польщі другої половини ХХ – початку ХХІ ст., окреслено її основні напрями й охарактеризовано вплив на суспільство, на піднесення національної свідомості поляків. **Висновки.** Протягом другої половини ХХ – початку ХХІ ст. РКЦ виступала носієм національної свідомості, зберігаючи мову, культурні традиції та історичну пам'ять. Культурно-релігійний вплив церкви на польське суспільство мав суттєве значення у формуванні моральних цінностей. Й вплив на освіту, мистецтво та громадську поведінку сприяв підтримці традиційних цінностей і встановленню етичних норм. Релігійна освіта, римо-католицька преса стали ключовими чинниками культурно-релігійного життя польського соціуму. РКЦ адаптувалася до нових суспільних реалій. Вона зберігала свою позицію в духовному житті суспільства, а також шукала відповіді на нові виклики, прагнула стати сучасним центром духовності й морального вдосконалення. Обґрунтовано, що в умовах суспільних змін на початку ХХІ ст., викликаних падінням комуністичного режиму, водночас спостерігалось й зниження народної підтримки церкви.

Ключові слова: Римо-католицька церква, польське суспільство, Республіка Польща, культурно-релігійна діяльність, релігійна освіта.

Problem Statement. Among the pressing issues of the development of modern Polish society, cultural and religious problems occupy a prominent place. To analyze them, it is expedient to use the experience of cultural and religious activities of the Roman Catholic Church in Poland from the second half of the 20th to the beginning of the 21st century. Traditionally, the cultural and religious realm was the field of activity of the Roman Catholic clergy, which achieved significant success in this area. The outlined problems have a general historical significance. Without considering the peculiarities of the socio-political and cultural religious activities of the Roman Catholic Church, it is difficult to study the history of Poland.

In domestic historical science, comprehensive studies of the cultural and religious activities of the Roman Catholic Church in Poland from the second half of the 20th to the beginning of the 21st century are absent. Therefore, it is relevant to study the peculiarities of cultural and religious activities of the Roman Catholic priests in Poland during the specified period. The chosen topic is of a significant scientific and humanitarian importance, which determines its social relevance under modern conditions of Poland's development.

Review of Sources and Publications. In modern Ukrainian historiography, there are studies that to some extent addressed the issues of cultural and religious activities of the Roman Catholic Church in Poland from the second half of the 20th to the beginning of the 21st century. Among the studies of Ukrainian historians, it is necessary to mention the dissertation research by M. Palinchak, which traces the activities of Roman Catholic monasteries in the field of charity and education: care for preschool institutions, schools, gymnasiums, hospitals, etc. (Palinchak, 2014). In the research by V. Plokhotnichenko, the influence of the Roman Catholic Church on educational processes in the Republic of Poland during the specified period is highlighted (Plokhotnichenko, 2022).

The relationship between the church and the state has been the subject of study by foreign, primarily Polish scholars. For example, A. Korbonski analyzed church-state relations in Poland after the fall of the communist regime, focusing on religious education, the spread of Christian values through the media, and negative tendencies within the Roman Catholic Church (Korbonski, 2000).

In the scientific research, I. Borowik studied the religious and cultural activities of Pope John Paul II, which substantially changed not only the Catholic Church but also the world in general (Borowik, 2002). Y. Osewska, G. Stala, and K. Bochenek illuminated the influence of culture and education on Polish society in the 1990s (Osewska, Stala, Bochenek, 2022). The situation of churches and religious communities during times of political, ideological and cultural change in the Czech Republic and Poland, when these countries were undergoing transformation from socialism to liberalism and democratic politics, was analyzed by T. Bubík (Bubík, 2014). The activities of the church and the state in the struggle for human rights in Poland are researched by J. Will (Will, 1984). The subject of research by scholars has also become reflection on religiosity as the subjective presence of religion in the lives of individuals and societies, and its transformations (Borowik, & Grygiel, 2023). The diversity of confessions in the Polish lands and their evolution in the 20th century is discussed in the study of B. Johnston (Johnston, 2017).

However, the analysis of historiographical material indicates that the cultural and religious activities of the Roman Catholic Church in Poland in the last quarter of the 20th and the first years of the 21st century require further historical and scientific interpretation.

The purpose of the article is to study the cultural and religious activities of the Roman Catholic Church in Polish society from the second half of the 20th to the beginning of the 21st century.

Results of the Research. Religion is closely associated with a specific historical, social, and cultural context. According to Pope John Paul II, the Polish culture exhibits distinct Christian characteristics, and Christian inspiration continues to be the primary source of creativity for the Polish artists (Jan Paweł II. Przemówienie do młodzieży, 1979).

The role of Pope John Paul II in the fall of communism in Eastern Europe between 1989 and 1991 demonstrated that religious beliefs can influence the course of history, societies, and nations transform through education and culture (Osewska, Stala, Bochenek, p. 8).

To implement the directives of the Second Vatican Council regarding culture, John Paul II established the Pontifical Council for Culture (Dinka, 1966). It initiated activities aimed at bringing together evangelization and contemporary culture, demonstrating the pastoral concern of the church to bridge the gap between the Gospel and cultures, collaborating with universities and historical, philosophical, scientific, artistic institutions to foster joint initiatives, supporting initiatives of international organizations on cultural matters, philosophy of science, anthropology, and monitoring the development of policies and actions of individual states in the field of culture (Osewska, Stala, & Bochenek, 2022, p. 11).

After the Second Vatican Council, the efforts of the Roman Catholic Church were directed towards creating conditions for the common good of society, fraternal relations, solidarity among people, and effective international cooperation against global threats. For the Catholic Church of the 20th century, it became a period of cooperation among Christian denominations, understanding in international relations based on the example of church dialogue (Kvik, 2023, p. 110). Pope John Paul II set the goal: “Christians must walk together in the name of the one Christ Jesus...” (Horbachevsky, 2016, p. 201).

An important feature of Roman Catholicism in Poland was the understanding of religion as encompassing spheres beyond the religious realm, as part of political confrontation. This was expressed both in everyday religious practice and in the broader activities of the church. Religious ritual became a central expression and manifestation of civil society: processions, pilgrimages, attending Mass, etc. (Borowik, 2002, p. 241). However, effective church activities were hindered by the communist political regime. For example, the Millennium of Poland’s Baptism in 1966 was a confrontation with the Millennium of Polish statehood organized by the communist authorities to discredit the Roman Catholic Church. During religious ceremonies, which were complicated by administrative and police obstacles, festivals, sports competitions, and recreational events were organized (Mendzhetskyi, & Bratsysevych, 2015, p. 309).

Public life in the Republic of Poland had a pronounced confessional orientation: religious symbols and attributes belonged to all state institutions, schools, and courts; the president of the country was required to take a religious oath. Many public institutions operated under the auspices of the Roman Catholic Church. Roman Catholic monasteries looked after 952 preschool institutions, 263 schools, 94 gymnasiums, 111 vocational schools, 294 hospitals, etc. Three Roman Catholic higher educational institutions operated in the country, which had the same rights as state ones: the Catholic University of Lublin, the Institute of Catholic Education in Warsaw, and the Higher Catholic School in Poznań (Palinchak, 2014a, p. 125).

However, after the adoption of the Constitution of Poland in 1952, the communists intensified their struggle against the church and religion, and by 1956, religious education was almost eliminated from state schools (Horbachevsky, 2016, pp. 335–336). For instance, on August 2, 1954, the Polish government liquidated theological faculties at Kraków and Warsaw Universities. Religious education was limited to private religious schools and the Catholic University of Lublin (Monticone, 1966, p. 86).

Since the arrival in 1956 of Władysław Gomułka to power, there was a relative normalization of state relations with the Catholic Church, persecution of the Roman Catholic Church ceased, and religious education was reinstated in state schools. However, religious education, as before, was not compulsory and was only introduced in schools where parents demanded it. However, soon the Polish government became concerned about the influence of religious education on youth and began to take measures regarding the restriction of religious

teaching. By 1960, in Poland there were nearly 3,000 schools without religious instruction (Dokumenty Druhoho Vatykanskooho Soboru, 2014, pp. 337–338)].

The Catholic Church was forced to seek new ways to support the Christian spirit of the population and the level of religiosity. At the local level, networks of parish centres began to be organized. After unsuccessful attempts to liquidate them, the authorities realized that it was better to control and supervise such centres. However, tension increased over the years, and strikes spread throughout the country. In response, in 1981, the Ministry of Education instructed school directors to coordinate the school schedule with the church calendar (Ogorzelec, 2022, p. 132).

In the late 1980s, the national Roman Catholic Church promoted the convergence of religious beliefs with the national identity of the Poles based on the historical traditions of the Polish people. Polish Catholicism became a sort of centre for shaping civil society in the new era, as during decades of communist rule, it metaphorically refused to be confined to a “church ghetto”. A symbolic event in this context was the election of Cardinal Karol Wojtyła of Krakow as Pope John Paul II on October 16, 1978 (Palinchak, & Andriyiv, 2023, p. 97).

Owing to the Pontificate of John Paul II, the Catholic Church became one of the most important cultural and historical factors in the modern world, strengthening its position in Polish society. As a Pole and a Christian, John Paul II understood well the church-state relations in Poland, as well as the specifics of cultural and religious activities. The Holy Father openly challenged the communist regime regarding the public presence of the Church in society, stating that the Polish government, contrary to the principles of religious freedom, was imposing atheism as a “new state religion”. He became a staunch and tireless advocate of the religious and civil rights of his people. As a result, in the 1990s, the number of dioceses increased in Poland, and the number of seminaries grew. Typically, theological studies in a seminary last six years. After the fifth year of study, seminarians are ordained as deacons. In the sixth year, graduates are required to undergo pastoral practice in parishes (Kościół katolicki w Polsce 1991 – 2011).

Extremely important was the granting of legal status to the Roman Catholic Church and its diocesan structures during the pivotal years of Poland’s independence (1989 – 1990), which opened opportunities for establishing schools by church entities (dioceses, monasteries, parishes), as well as societies and foundations. Thus, already in 1994, there were seventy Catholic schools, and in the academic year 2016/2017, 610 Catholic schools were operational.

In this context, very notable was John Paul II’s speech during his visit to the city of Łowicz on June 14, 1999: “I am pleased that more and more Catholic schools are emerging in Poland. This is a sign that the Church is present in a concrete way in the field of education. These schools need to be supported and create such values so that they can serve the good of society together with all schools in Poland” (Ksendzerski, 2017). John Paul II succeeded in encouraging young people to take a more respectful approach to the Church and its teachings. The Roman Pontiff managed to attract young people to the path of seminary studies and consecrated monastic life. The Pope encouraged young married couples to live a full and deep Catholic life.

The development of Polish democracy and the activation of cultural religious activities were facilitated by the adoption of a new Constitution, which came into force on October 17, 1997. A feature of the Polish Constitution is the guarantee of the rights of parents and guardians to ensure religious education and upbringing of their children according to their beliefs (Palinchak, 2014b, p. 86). Parents have the right to moral and religious education according to their convictions (Konstytucja Rzeczypospolitej Polskiej, 1997).

A renowned scholar M. Palinchak believes that Poland today remains a country with a strong representation of religious tradition, which undoubtedly affects the relations between the state and the church in the educational sphere. According to the Law “On the Education System” (1991), in public schools starting from April 14, 1992, all religious organizations recognized by law have the right to conduct religious education in schools for 2 hours per week if there are at least 7 students in the class who adhere to that religion. Religious organizations and the state jointly control the teaching of religion. In case parents are against the study of religion in school, children choose between three additional humanities subjects, one of which they are certified in. Recently, the content of the religious education course has been reviewed by abandoning the traditional legislative approach and introducing philosophical, individually oriented issues that encourage reflection on various life situations through the prism of faith (Palinchak, 2011, pp. 165–166).

At the beginning of the 21st century in Poland, the basis for teaching religion at schools became the Law on Education of 2002. According to it, two hours per week were allocated for religious education at schools of all types. In exceptional cases, with the consent of the bishop, these hours may be fewer. Thus, religious education is organized in educational institutions at the request of parents, and religion becomes a compulsory subject for students (Plokhhotnichenko, 2022, p. 133).

Table 1

The number of Catholic schools in the 2011 – 2012 academic year

Type of educational institution	Number of schools, k
Total	540
Primary schools	162
Incomplete secondary schools	190
General education schools	137
Vocational educational establishments	20
Schools for children and youth with learning difficulties	21
Special schools for sick and disabled children and youth	10

Source: Ciecieląg, P., Lysoń, P., Sadłoń, W., & Zdaniewicz, W. (Eds.). (2014). *Kościół katolicki w Polsce 1991 – 2011* [Catholic Church in Poland 1991 – 2011]. Warszawa: Główny Urząd Statystyczny; Zakład Wydawnictw Statystycznych. URL: https://stat.gov.pl/files/gfx/portalinformacyjny/pl/defaultaktualnosci/5515/12/1/2/rs_kosciol_katolicki_1991-2011.pdf

In the 2016 – 2017 academic year in Poland, there were already 610 Catholic schools operating: 194 primary schools, 209 secondary schools, 134 comprehensive high schools, and 73 schools of other types: artistic, technical, vocational, for students with behavioral and developmental problems, and schools in social assistance centres. Over 10 000 teachers worked in Catholic schools, and 66 365 students were enrolled (Ksendzerski, 2017). Society trusts Catholic schools, considering them leading educational institutions. These schools are part of the church’s educational mission, open to students from neglected, both religiously and morally, families, non-believers, or representatives of other denominations.

The activity of the established Council of Catholic Schools is indicative; it belongs to the entities that are social partners of the Ministry of Education and takes part in evaluating the Ministry’s draft laws and legislative processes in the committees of the Polish Sejm

(Ksendzki, 2017). The National Bureau of the Council assists and actively participates in establishing new Catholic schools, provides them with legal support, model statutes, and other documents, and trains directors. All schools receive effective support from the Council during educational reforms. At the initiative of the Council of Catholic Schools, Poland's Catholic Church holds a Week of Education. The Council of Catholic Schools conducts systematic publishing activities for the needs of Catholic education.

Catholic print media had a significant impact on spreading the cultural identity of Poles. After 1989, there were fundamental changes in the publishing industry and Catholic press. Political changes led to the abolition of censorship, and economic challenges placed all publishers, including Catholics, before the challenges of the free market. The share of Catholic publications in the Polish book market at the beginning of the 21st century was nearly 5% (Kościół katolicki...).

In Poland, there are also Catholic-oriented mass media outlets. Since 1989, there have been Catholic editors at Polish Radio and Polish Television. Educational, advisory, and religious programmes have been broadcast on Telewizja TRWAM since 2003. Church organizations have a nationwide radio programme (Radio Maryja) (Kościół katolicki...).

Roman Catholicism is deeply rooted in the cultural and religious life of the Poles. Ideas and principles of life according to Christian values are expressed through accessible means of contemporary culture. In Poland, numerous cultural events of various levels are organized annually. From religious festivals to Christian art fairs in Poland and around the world. The Church also acts as a guardian of many monuments – churches and sacred buildings, diocesan and parish museums. Christianity in Poland is also noticeable in education. The country has several Catholic universities and universities with papal status (Johnston, 2017; Bubik, 2014).

Sociological surveys indicate that about 90% of modern Poles consider themselves Roman Catholics. Almost all parents of newborns perform the sacrament of baptism. However, contemporary Catholicism is losing its main religious meaning and is turning into a system of rituals and rituals closely linked to mass culture (Ogorzelec, 2022, p. 109).

It is worth noting that at the beginning of the 21st century, disputes over the place of the Roman Catholic Church in social life intensified, and criticism of the church became more aggressive than in the early 1990s. In a modernizing Polish society, the Roman Catholic Church seeks to rethink its position regarding both institutions of social life and individual social groups (Mariański, 2017, p. 144).

The sphere of conflict between the church and the state arose around religious education in public schools. The dispute focused on two issues: sex education and whether grades for religious education should be part of official school certificates. When the Ministry of Education first expressed the idea of introducing sex education in secondary schools, it was immediately attacked by the Catholic Church, which launched a campaign to discredit this idea and condemn the textbooks chosen for the course. Fierce opposition managed to postpone the consideration of the bill in parliament until a change of government after the 1997 elections. The new Minister of Education rejected this idea, instead proposing a softened version of social studies. Religious education was to be voluntary. The Church also insisted that grades for students attending religious classes be part of official school certificates (Korbonski, 2000, pp. 131–132).

An important issue was the legalization of abortions. Until the early 1990s, Poland, like other countries in Central and Eastern Europe, had a fairly liberal abortion law, which Polish women primarily used as a means of birth control. The Roman Catholic Church (RCC) took

the lead in advocating for amendments to the law and used all its authority and influence to persuade parliament to pass a new law against abortions. Church pressure was also exerted on Polish doctors, who adopted the “Medical Code of Ethics”, which strongly opposed abortions.

Among other important issues in the 21st century is the legal status of women in Poland. The RCC opposes the women’s rights movement and stands against many proposals regarding women’s rights, being one of the major obstacles to the respect for women’s freedom (Szocik, & Szyja, 2015, pp. 16–17).

It is worth noting that religious institutions were not included in the list of objects of the lustration laws of 1997 and 2006, which aimed to remove secret agents of the communist era from post-communist positions of power and influence. Thus, representatives of the clergy, including new bishops, were exempted in 2007 from formal verification processes (Kunicki, 2021, pp. 36–37). However, as noted by the Polish researcher Mikołaj Kunicki, a prominent Catholic clergymen collaborated with the communist secret police. The pro-Catholic and national conservative party “Law and Justice” startled Polish bishops by exposing communist secret agents among the clergy (Kunicki, 2021, p. 22).

Therefore, under the conditions of social changes at the beginning of the 21st century, prompted by the fall of the communist regime, church-state relations in Poland present a complex picture. On the one hand, the RCC continues to hold a leading position in the country, and on the other hand, the church’s activities were not always approved by the Poles in many aspects of its functioning, including issues of religious education, anti-Semitism, large church finances, and more. As a result, there has been a decline in popular support for the church.

Conclusions. In the second half of the 20th and early 21st century, Poland experienced a period of profound political, ideological and cultural changes directly related to the countries transformation from socialism to liberalism and democratic politics. In Poland, as in many other post-socialist countries (e. g., Romania, Croatia, Ukraine) that experienced communism and the transformation after its collapse, the level of religiosity and the relationship between religion and national identity are stronger than in Europe as a whole. After the fall of the communist regime in Poland, the Roman Catholic Church (RCC) adapted to new social realities, returning to its traditional segments of social life, and there is a revival of the religious education system. With the adoption of the new Constitution, religious education and the Roman Catholic press become key factors in the cultural religious life of Polish society. The cultural and religious influence of the church on Polish society was significant in shaping moral values.

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ROLE OF LAW ENFORCEMENT AGENCIES IN THE IMPLEMENTATION OF THE NATIONAL SECURITY STRATEGY IN UKRAINE (1991 – 2014)

Abstract. *The purpose of the study is to analyze the current legislation of Ukraine in the context of the system formation for ensuring national security of Ukraine, to identify the role of law enforcement agencies in building the national security strategy, and to study the main areas of legal regulation of the law enforcement agencies activities in this area. The Methodology of the Research.* In the study there have been used general scientific and special methods, in particular, owing to the historical legal method, the conceptual principles in interpreting the concept of national security and law enforcement agencies have been revealed, the legislation has been analyzed; systemic structural and formal logical methods have been applied. **The scientific novelty:** the areas of activity of law enforcement agencies as subjects of the national security system of Ukraine have been analyzed, and the directions of state policy implementation in this area have been outlined. **Conclusions.** Based on the analysis of the legislation of Ukraine during the period of 1990 – 2014, it has been stated that the national security system is a set of subjects of ensuring national security, which united common goals regarding the interests of the state and society. The fundamental state-forming documents of the 1990s outlined a set of identical concepts related to national security. The specification of threats in the field of national security, and therefore the creation of more effective directions of state policy, took place at the beginning of the 2000s and the adoption of the first two National Security Strategies in 2007 and 2012. However, their excessive declarativeness, terminological overload partially improved the practical activities of security subjects.

The activities of law enforcement agencies in this area are mainly the protection of citizens' rights and freedoms, the state and public interests from unlawful encroachments, ensuring security. It has been determined that during the specified period, the activities of law enforcement agencies in the field of national security required coordination of various branches of legislation, the adoption of special legislation. It has been noted that such specific steps towards developing a new national security strategy with a clearer and more systematic regulatory framework took place after 2014: a number of innovations were adopted that update the systemic development of security and defense sector, which also include law enforcement and intelligence agencies.

Key words: law enforcement agencies, national security, Ministry of Internal Affairs, Security Service of Ukraine, entities ensuring national security.

РОЛЬ ПРАВООХОРОННИХ ОРГАНІВ У РЕАЛІЗАЦІЇ СТРАТЕГІЇ НАЦІОНАЛЬНОЇ БЕЗПЕКИ В УКРАЇНІ (1991 – 2014)

Анотація. Мета роботи – аналіз чинного законодавства України у контексті становлення системи забезпечення її національної безпеки, виокремлення ролі правоохоронних органів у побудові стратегії національної безпеки, вивчення головних напрямів правового регулювання діяльності правоохоронних органів у цій сфері. **Методологія дослідження.** У роботі використані загальнонаукові та спеціальні методи, зокрема завдяки історико-правовому методу розкрито концептуальні засади у трактуванні поняття національної безпеки, правоохоронних органів, проаналізовано законодавство; застосовані системно-структурний та формально-логічні методи. **Наукова новизна:** проаналізовано напрями діяльності правоохоронних органів як суб'єктів системи національної безпеки України, окреслено напрями реалізації державної політики у цій сфері. **Висновки.** На основі проведеного аналізу законодавства України в період 1990 – 2014 рр. стверджено, що система національної безпеки була сукупністю суб'єктів забезпечення національної безпеки, які об'єднували спільні цілі щодо інтересів держави та суспільства. Зasadничі державотворчі документи 1990-х рр. окреслювали комплекс тотожних понять, які стосувалися національної безпеки. Конкретизація загроз у сфері національної безпеки, відтак створення більш дієвих напрямів державної політики відбулося на початку 2000-х рр. та із прийняттям двох перших Стратегій національної безпеки у 2007 та 2012 р. Проте їхня надмірна декларативність, термінологічне переобтяження лише частково поліпшила практичну діяльність суб'єктів безпекової сфери.

Діяльність правоохоронних органів у цій сфері – це головно захист прав та свобод громадян, держави та суспільних інтересів від протиправних посягань, забезпечення безпеки. Стверджено, що в окреслений період діяльність правоохоронних органів у сфері національної безпеки вимагала взаємоузгодження різних галузей законодавства, прийняття спеціального законодавства. Зауважено, що такі конкретні кроки щодо вироблення нової стратегії національної безпеки із більш чітким та систематизованим нормативним забезпеченням відбулися після 2014 р.: прийнято низку новацій, які актуалізують системний розвиток сектору безпеки і оборони до яких також відносять і правоохоронні та розвідувальні органи.

Ключові слова: правоохоронні органи, національна безпека, Міністерство внутрішніх справ, Служба безпеки України, суб'єкти забезпечення національної безпеки.

Problem Statement. Law enforcement agencies are an important state body that implements the state's policy in the field of national security and defense. In Ukrainian legal science, discussions are ongoing regarding the definition of law enforcement agencies. A researcher Vitaliy Makarchuk, having analyzed the studies by Ukrainian scholars and current legislation on this issue, identifies the following law enforcement agencies that directly influence and are responsible for national security: "National Police of Ukraine, Prosecutor's Offices, National Anti-Corruption Bureau of Ukraine, State Bureau of Investigation, Military Law Enforcement Service of the Armed Forces of Ukraine, State Security Department of Ukraine, State Border Protection Bodies". The author noted the important role of the Security

Service of Ukraine and the Ministry of Internal Affairs of Ukraine. After all, these state bodies “directly influence the formation and implementation of state policy in the field of ensuring national security and defense of the state” (Makarchuk, 2021a, p. 21).

With the restoration of Ukraine’s independence and development of the state apparatus, the problem of formulating and understanding the interdisciplinary concept of “national security” arose, because in the USSR such a term did not function. In the party-ideological and state-administrative, legislative sphere there were used such concepts as “state security”, “international security”, “military security”. In recent decades, the application of the concept of “national security” has significantly gone beyond the boundaries of legal science and has become widely used in research on economics, ecology, public administration, etc. Gradually transforming into an applied and interdisciplinary term that is widely used in the socio-humanitarian field of knowledge (Smolianiuk, 2021, pp. 166–167).

The goals and functions of law enforcement agencies in the context of implementing national security and defense policy “do not have their own regulatory framework”. That is, each individual body that is part of the law enforcement system has its own developed legal field of activity, so it is only possible to outline a generalized characteristic of functions and features of each of the bodies (Zahumenna, 2023, p. 86). Therefore, the analysis of regulatory acts in the field of legislative support for national security has been carried out, the powers of the Internal Affairs Bodies and the Security Service of Ukraine have been considered, taking into account their significant influence on the implementation of state administration in the field of national security.

Review of Recent Publications and Research. Among a number of studies that covered various aspects of the problem of national security, the following authors should be mentioned: Volodymyr Horbulin (Horbulin, 2008; Horbulin, & Lytvynenko, 2009; Horbulin, & Kachynskiy, 2011) Hryhoriy Sytnyk (Sytnyk, Oluiko, & Vavrynychuk, 2007; Sytnyk, 2009), Volodymyr Lipkan (Lipkan, 2003; Lipkan, Lipkan, Lipkan, 2006). Research on the activities of law enforcement agencies in the context of the security system of Ukraine was studied by Vitaliy Makarchuk (Makarchuk, 2023; Makarchuk, 2021a); Myroslav Kryshtanovych (Kryshtanovych, 2013; Kryshtanovych, 2014), Ihor Zozulia (Zozulia, 2012, pp. 389-394; Zozulia, 2008), Oleksandr Bandurka (Bandurka, 2004). In the English-language historiography, research in the context of the Russo-Ukrainian war, geopolitical changes, and challenges in the European security system prevails (Raik, 2019; Kanet, 2017; Zannier, 2015; Big-Alabo, & Mac Alex-Achinulo, 2022; Kuzio, 2018), on the other hand, the issues of Ukraine’s policy in the national security sector, especially in 1990 – 2000, are researched less significantly (Wolczuk, 2002; D’Anieri, 2023). In this study, we have been guided by the methodological recommendations of Vasyl Ilnytskyi and Mykola Haliv (Ilnytskyi, & Haliv, 2022; Haliv, & Ilnytskyi, 2023).

The purpose of the study is to reveal the theoretical, legal foundations and problems of law enforcement agencies in implementing the state policy in the field of national security of Ukraine from 1991 to 2014 comprehensively.

Research Results. One of the first to use the concept of “national security” was the US President Theodore Roosevelt in a 1904 address to Congress. President T. Roosevelt used this concept to justify the expediency of annexing part of the Panama Canal (Melnychenko, & Fihel, 2021, p. 69). The term began to be used more widely after World War II, mainly during the Cold War. The confrontation between the states directly influenced America’s adoption of the National Security Act, and in the following years a new field of knowledge,

strategic studies, was formed (Makarchuk, 2021b, pp. 6–7; Krause, & Williams, 2018, p. 14). American political scholar Chao Wu notes that the concept of national security is complex and multifaceted, while its content itself has also undergone significant transformation. Primarily used to justify protection against military attack, the concept now “also includes non-military dimensions such as security from terrorism, crime minimization, economic security, energy security, environmental security, food security, and cybersecurity” (Wu, 2024, pp. 1–2).

Since 1991, Ukraine has undergone a gradual process of including the concept of “national security” in the legislative framework and implementing it in state-building processes (Smolianiuk, 2021, p. 167). One of the first documents that initiated this process was the Resolution of the Verkhovna Rada of Ukraine “On the Main Directions of Ukraine’s Foreign Policy”. The resolution outlined Ukraine’s national interests in terms of international relations and used the concept of “national security” for the first time: “strategic and geopolitical interests related to ensuring the national security of Ukraine and protecting its political independence”. The legislator also identified three main groups of national interests in the field of international relations: “strategic and geopolitical interests related to ensuring the national security of Ukraine and protecting its political independence”, economic and regional (subregional, local) interests (Postanova, 1993). A researcher V. Smolianiuk noted the importance of this document, because this resolution, although it had a foreign policy direction, outlined the issues of implementing the term national security in the regulatory and legal space (Smolianiuk, 2021, p. 167).

The regulatory and legal foundations of Ukraine’s national security strategy were laid down in the 1996 Constitution of Ukraine. The basic law outlined the main parameters of the activities of authorized authorities in the field of national security, and also laid the foundations for “current legislation on ensuring national security” (Chuiko, 2008, p. 3). Article 92, in which there are outlined the laws of Ukraine in Paragraph 17, it is noted that it defines “the foundations of national security, the organization of the Armed Forces of Ukraine, and the maintenance of public order”. Article 106, which specifies the powers of the President of Ukraine, states that he “ensures state independence, national security...” and “heads the National Security Council of Ukraine”. Article 107 of the Constitution of Ukraine outlines that the coordinating body responsible for national security and defense issues is the “National Security Council of Ukraine”. In accordance with Article 116, measures to guarantee defense capability and national security are carried out by the Cabinet of Ministers of Ukraine (Konstyutsiia Ukrainy, 1996).

The first fundamental document that defined the principles of state policy in the field of national security was “Concept (Fundamentals of State Policy) of National Security” adopted in January of 1997. This document outlined the content of national security for the first time: “National security of Ukraine as a state of protection of the vital interests of the individual, society and the state from internal and external threats is a necessary condition for the preservation and increase of spiritual and material values”. The main objects and principles are formulated: “The main objects of national security are: a citizen – his rights and freedoms; society – its spiritual and material values; the state – its constitutional order, sovereignty, territorial integrity and inviolability of borders. The main principles of ensuring national security are: priority of human rights; rule of law; priority of contractual (peaceful) means in resolving conflicts; adequacy of measures to protect national interests against real and potential threats; democratic civilian control over the military sphere, as well as other bodies in the system of ensuring national security” (Postanova, 1997).

Priority national interests, threats to national security in the most important spheres of life (political, economic, social, military, environmental, scientific and technological), information, system (subjects) of ensuring national security have also been identified. Let us consider the directions of the national security state policy of Ukraine in the military sphere in detail. The directions include the creation of effective mechanisms and comprehensive measures to counter possible aggression or military conflict, violation of the state border and territorial integrity, elimination of consequences, and “ensuring democratic civilian control over the military organization of the state” (Postanova, 1997). It should be noted that the subjects of the national security system are the Ukrainian people, the Verkhovna Rada of Ukraine, the President of Ukraine, the Cabinet of Ministers of Ukraine, the Constitutional Court of Ukraine, the Prosecutor General of Ukraine, the National Bank of Ukraine, ministries and other executive bodies, and the Military Organization of the State (VOD). The VOD system included: “The Armed Forces of Ukraine, the Security Service of Ukraine, internal troops, bodies and units of the Ministry of Internal Affairs of Ukraine, the Border Troops of Ukraine, military units of the Ministry of Ukraine for Emergencies and for the Protection of the Population from the Consequences of the Chernobyl disaster, other military formations created in accordance with the Constitution of Ukraine, ensuring the defense of Ukraine” (Postanova, 1997).

In the following years, there was the problem of a clear understanding of the essence of the military organization, the interaction of ministries, various departments and services. In the summer of 2003, two laws were adopted: “On the Fundamentals of National Security” of June 19, 2003; “On Democratic Civilian Control over the Military Organization and Law Enforcement Bodies of the State” of June 19, 2003, which, according to the definition of a lawyer V. Smolianiuk, “reveal the essence of the VOD in a somewhat different way”. Thus, in the future there was a rather unclear interpretation of the main characteristics of the VOD. However, the main problem of the military organization, according to V. Smolianiuk, during the 1990s were the problems of establishing joint, coordinated activities of the united security forces (Smolianiuk, 2017, p. 74).

A significant stage in the development of the national security sphere of Ukraine was the adoption of the Law of Ukraine “On the Fundamentals of National Security of Ukraine” in 2003. It increased the number of spheres of ensuring national security (initially there were 11, and after amendments – 12: foreign policy, domestic policy, state security, military, state border security, economic, social, scientific and technological, humanitarian, environmental, information, civil protection). Innovative was a more precise delineation of the priorities of national interests, their threats, and key areas of activity in these areas (Smolianiuk, 2021, pp. 169–170).

The main document outlining the directions of state policy in the field of national security is the National Security Strategy of Ukraine. This document is developed by the instruction of the President of Ukraine (within 6 months from the moment of taking office), approved by the decision of the National Security and Defense Council of Ukraine and by Decree of the President of Ukraine. The National Security Strategy “Ukraine in a Changing World” was first approved by President of Ukraine Viktor Yushchenko on February 12, 2007. The main task was to create a level of national security in Ukraine that would “guarantee the progressive development of Ukraine, its competitiveness, ensuring the rights and freedoms of man and citizen, and further strengthening the international positions and authority of the Ukrainian state in the modern world”. It should be noted that in the document there are

outlined specific external challenges to Ukraine's national security: the unresolved conflict in the Republic of Moldova (Transnistrian region), the unresolved issue of delimitation of the state border of the Black and Azov Seas, the Kerch Strait and the border with the Russian Federation, the Republic of Belarus, and the Republic of Moldova, problematic issues with the temporary presence of the Russian Black Sea Fleet on the territory of Ukraine (Stratehiia natsionalnoi bezpeky Ukrainy, 2007; Spivak, 2023, pp. 1050–1051).

In 2012, the next National Security Strategy of Ukraine was approved, which was essentially an updated version of the previous document. According to Decree of the President of Ukraine "On Decision of National Security and Defense Council of Ukraine" of June 8, 2012 "On New Edition of National Security Strategy of Ukraine", amendments were made to the National Security Strategy of Ukraine of February 12, 2007 (Shevchenko, 2021, p. 154). The general provisions of the 2012 National Security Strategy emphasize that the 2007 Strategy "did not become a guiding document for the practical activities of state authorities" due to their "focus on achieving short-term political and economic goals, neglect of the needs of the strategic development of society and state. As a result, threats to national security have increased, and Ukraine's ability to protect its national interests has weakened" (Ukaz Prezydenta Ukrainy, 2012).

However, as a lawyer Ihor Zozulia emphasizes, such a characterization is "generalized and impersonal", because the activities of law enforcement agencies directly depend on the directions of state policy (Zozulia, 2012, p. 389). The updated National Security Strategy of 2012, among a number of areas for improving the national security system of Ukraine, identifies "strengthening the functional capacity of the security and defense sector, primarily law enforcement and intelligence agencies". It also details the current threats to national interests and national security of Ukraine in the external space, in the internal security environment. It is noted that there is a "mismatch between the security and defense sector of Ukraine and the task of protecting national interests, which is characterized by: the inconsistency of the law enforcement system of Ukraine with the task of effectively protecting the rights, freedoms and legitimate interests of a man and citizen; the insufficient efficiency of the activities of state bodies carrying out intelligence and counterintelligence activities; the continuing deterioration of the state of the Armed Forces of Ukraine and the defense industry; the imperfection of the Unified State System of Civil Protection of the Population and Territories" (Ukaz Prezydenta Ukrainy, 2012).

The Revolution of Dignity marked, according to a researcher V. Smolianiuk, the transition to "a fundamental stage of socio-political reflection on the issues of national security" (Smolianiuk, 2017, p. 76). After Russia's annexation of the Autonomous Republic of Crimea and the start of armed aggression in Eastern Ukraine, the introduction of the ATO legal regime (Vyhivskyi, & Trembetsky, 2024, p. 150) the primary objectives of Ukraine's national security policy became the protection of Ukraine's state sovereignty and its territorial integrity (Antonov, 2017, p. 436). It is worth noting that the aggression of the Russian Federation against Ukraine in 2014 and changes in the geopolitical map of the world prompted the revision of the National Security Strategy of Ukraine, the adoption of a new, revised document that more systematically takes into account threats and outlines the priorities of the state national security policy (Antonov, 2017, p. 432). Approved on May 26, 2015 the National Security Strategy is formulated on the basis of Decree of the National Security and Defense Council of Ukraine "On the National Security Strategy of Ukraine" dated May 6, 2015. It outlines new challenges and priorities of state policy, implementation of reforms

until 2020. It was determined that the Cabinet of Ministers is responsible for carrying out a comprehensive review of the security and defense sector of Ukraine, developing reforms of the security and defense sector bodies of Ukraine, and implementing the rearmament of the Armed Forces of Ukraine and other military formations in accordance with the concept of the State Targeted Defense Program for the Development of Armaments and Military Equipment for 2016 – 2020 (Spivak, 2022, pp. 1051–1052).

Among comprehensive activities of state administration bodies in protecting national security, the leading role belongs to the internal affairs bodies. According to the Law of Ukraine “On the Police” of December 25, 1990, which lost its validity in 2015 (after the reform and creation of the National Police of Ukraine), which is the basic legislative act, the functions of this body are outlined: “The police in Ukraine is a state armed body of executive power that protects life, health, rights and freedoms of citizens, property, natural environment, and interests of society and state from unlawful encroachments”. The tasks of the relevant Ministry of Internal Affairs are disclosed in detail by the “Regulations on the Ministry of Internal Affairs of Ukraine”, approved by the order of the President of Ukraine dated October 7, 1992: “organization and coordination of the activities of internal affairs bodies to protect the rights and freedoms of citizens, the interests of society, and the state from unlawful encroachments, protection of public order and ensuring public safety; ensuring the prevention of crimes, their cessation, disclosure and investigation; organization of work related to ensuring road safety and fire safety, organization of the activities of internal affairs bodies and internal troops to fulfill the tasks assigned to them, etc.” (Zakon Ukrainy, 1990: Rozporiadzhennia Prezydenta Ukrainy, 1992; Horbulin, & Kachynskyi, 2009, pp. 176–177).

The activities of law enforcement agencies in the field of ensuring national security have a dual characteristic. Internal affairs agencies carry out multifaceted activities to counter threats to national security, and national interests essentially become the object of their protection, although the internal affairs agencies are not special agencies that are called upon to directly guarantee state security (such as the SBU) (Kryshtanovych, 2013, p. 145). The sphere of activity of the Ministry of Internal Affairs in the context of ensuring national security is multifaceted, as it combines various types of public relations, in particular in the sphere of economic, financial, housing and communal services, social and other activities (Kryshtanovych, 2014, p. 168). Thus, as a researcher M. Kryshtafovych aptly noted, “the main content of regulatory legal acts that regulate the activities of the Ministry of Internal Affairs in the context of national security are norms that regulate social relations in various branches of law”, and this, in turn, led to the emergence of “legal norms” that related to individual aspects of national security. Therefore, it was important to establish various branches of legislation, or to develop a comprehensive system of regulatory and legal support for national security (Kryshtanovych, 2014, p. 169).

With the declaration of independence of Ukraine, the issue of reforming the former system of state security bodies became relevant. After the liquidation of the Committee for State Security of the Ukrainian SSR on September 20, 1991, the Security Service of Ukraine was established, and the formation of this body was legally established on March 25, 1992. The legislator interprets the Security Service of Ukraine as a “state law enforcement body ensuring state security”, which is responsible for protecting state sovereignty, constitutional order, territorial integrity and economic potential of Ukraine. It fights intelligence and subversive activities, organized crime, etc. (Myrhorod, 2024, p. 223). The SBU underwent a significant transformation during the period of 1991 – 2007, its structural units were reorganized, in particular, it included state protection bodies for senior officials (until 1998;

the State Protection Department of Ukraine was formed on their basis); bodies and units of foreign intelligence with military units of radio-electronic intelligence (until 2005), they were reformatted into the Foreign Intelligence Service of Ukraine; and until 2007, they included bodies and units of special telecommunications systems and information protection with subordinate government communications troops (on their basis, the State Service for Special Communications and Information Protection of Ukraine was organized) (Anufriiev, & Kopotun, 2022, pp. 3–4). However, one of the most significant challenges for Ukrainian statehood, and therefore for the SBU employees, was the events of 2014 in the context of the Russian Federation's armed aggression against Ukraine. The Russian invasion, due to its coordinated actions, good preparation, and a number of other reasons, met with little resistance by law enforcement and government bodies. In the ATO zone, the Center for Special Operations to Combat Terrorism, the Center for Special Operations "A" of the SBU conducted a number of complex operations to detect and stop terrorist attacks and actions that threatened national security (Anufriiev, & Kopotun, 2022, p. 5).

Conclusions. Since the restoration of independence, Ukraine has begun the process of forming a regulatory and legal framework for national security policy. The first document that defined the principles of state policy in the field of national security was the "Concept (Fundamentals of State Policy) of National Security" of 1997. A new stage in the development of the national security sphere of Ukraine was marked by the adoption of the Law of Ukraine "On the Fundamentals of National Security of Ukraine" in 2003. The importance of this law, among other things, lies in the fact that it first outlined the regulatory and legal regulation of the activities of law enforcement agencies in the field of ensuring national security. This law became the basis for the National Security Strategies of Ukraine in 2007 and 2012. However, despite these steps, the lack of specific organizational and legal principles for the functioning of law enforcement agencies to ensure national security remained a significant problem. Therefore, against the background of growing foreign policy threats from the Russian Federation after 2014 and in the context of reforming the state apparatus, transformations also took place in the security sphere of the Ukrainian state.

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**CREATION OF THE FIRST PRIVATE MILITARY AND SECURITY COMPANIES
IN THE RUSSIAN FEDERATION (1998 – 2013)**

Abstract. The purpose of the research. The author set himself the aim of researching and revealing the creation of the first Russian private military and security companies at the end of the 1990s, as a modern mercenarism phenomenon of previous generations. **The research methodology** is based on the general scientific principles of objectivity, systematicity and historicism. In the research there have been used general scientific methods: logical, analysis, synthesis, periodization and the others, as well as special methods of historical research: historical and genetic, historical and comparative, chronological. **The scientific novelty** of the obtained results consists in the comprehensive analysis of the creation process of the first private military and private security companies in the Russian Federation from the end of the 1990s to the beginning of the 2000s, their tasks, geography of activity, peculiarities of training and motivation of mercenaries. **Conclusions.** After analyzing the recent research and publications, it has been determined that the first among Russian private military and security companies at the end of the 1990s there were established “Orel-Antiterror”, “RIK”, “Ferox”, Moran Security Group, “RSB-Group”, Vega, “Slavyansky Corps” and “Wagner”. Private military

and security companies became a very promising and attractive business. In fact, they became a tool in the hands of pro-government Russian oligarchic groups to satisfy their business interests both domestically and abroad. The emergence of such structures has significantly expanded the ability of the Russian Federation to project its influence through military means in different regions of the world, in particular in Ukraine since 2014 and since 2015 in Syria, using hybrid influence and methods that the state cannot officially use. Private military companies were controlled by the Russian special services and staffed mainly by ex-servicemen from various power bodies and who had combat experience. Training of mercenaries was carried out in training centres and on military training grounds. Open or covert support of mercenaries, in particular financial, was provided by the state. The motivational factor for mercenaries was financial mainly.

Key words: mercenarism, mercenary private army, private military company, private security company, Russian mercenaries.

СТВОРЕННЯ ПЕРШИХ ПРИВАТНИХ ВІЙСЬКОВИХ ТА ОХОРОННИХ КОМПАНІЙ У РОСІЙСЬКІЙ ФЕДЕРАЦІЇ (1998 – 2013)

Анотація. Мета дослідження. Автор поставив за мету дослідити та розкрити створення перших російських приватних військових й охоронних компаній наприкінці 1990-х рр. як сучасне продовження давнього феномена військового найманства. **Методологія дослідження** ґрунтується на загальнонаукових принципах історизму, об'єктивності та системності. У роботі використані загальнонаукові методи: логічний, аналізу, синтезу, періодизації, реконструкції, контент-аналізу та інші, а також спеціальні методи історичного дослідження: історико-генетичний, історико-порівняльний, хронологічний. **Наукова новизна** одержаних результатів полягає у комплексному аналізі процесу створення у Російській Федерації перших приватних військових та охоронних компаній з кінця 1990 – на початку 2000-х рр., їхніх завданнях, складі, географії діяльності, особливостях підготовки та мотивації найманців.

Висновки. Проаналізувавши останні дослідження та публікації, автори з'ясували, що першими серед російських приватних військових та охоронних компаній наприкінці 1990-х років були і "Орел-Антитеррор", "РИК", "Феракс", Moran Security Group, "РСБ-Групп", Vega, "Славянский корпус" і "Вагнер". Приватні військові й охоронні компанії стали дуже перспективним і привабливим бізнесом. Фактично, вони в руках провладних російських олігархічних груп перетворилися на інструмент для задоволення своїх бізнес-інтересів як всередині країни, так і за кордоном. Поява таких структур суттєво розширила можливості Російської Федерації проєктувати свій вплив військовим шляхом у різних регіонах світу, зокрема в Україні з 2014 р. та з 2015 р. – в Сирії, використовуючи гібридний вплив і методи, якими держава офіційно не може скористатися. Приватні військові компанії контролювалися російськими спецслужбами і комплектувалися переважно колишніми військовослужбовцями із різних силових структур, які мали бойовий досвід. Підготовка найманців здійснювалася у тренувальних центрах та на військових полігонах. Відкрито чи приховано підтримку найманцям, зокрема фінансову, надавала держава. Мотиваційним чинником у найманців був переважно фінансовий.

Ключові слова: найманство, наймана приватна армія, приватна військова компанія, приватна охоронна компанія, російські найманці.

Problem Statement. The mercenary warfare practice and involvement of military specialists on a contractual basis in wars and conflicts has a centuries-old history. A widespread use of private military companies (hereinafter referred to as PMCs) in modern wars is closely related to the hybridity of their actions (Melnyk, 2023). The geopolitical changes that occurred in the world with the end of the Cold War prompted a rapid development of a private military industry. Since then, private military and security companies (hereinafter referred to as PMSCs) have become a very promising and attractive business. International humanitarian law experts and analysts predict a rapid spread and expansion of the types of services that PMSCs can provide. A certain prototype and prerequisite for the creation of PMCs in the Russian Federation

(hereinafter referred to as the RF), which have been operating on the territory of Ukraine since 2014 to the present during the current Russo-Ukrainian war (Hrytsiuk, & Lysenko, 2023), were paramilitary formations (organizations and volunteer units) that participated in military conflicts in the post-Soviet space, in particular in Transnistria, the North Caucasus, and Yugoslavia in the 1990s. Ensuring national security and countering Russian armed aggression make this issue relevant and necessitate the need to generalize and study the experience of establishing the first private military and security companies in the Russian Federation.

Review of Recent Research and Publications. The issue of creation and activities of the Russian PMCs is being studied by many scholars and journalists. For example, in 2003, the monograph by M. Boltunov was published (Boltunov, 2003), in which there are described the features of selection and staffing of the Russian private company “Orel-Antiterror” and the “Vympel” group, as well as their main purpose. In 2004, on Radio Liberty there was material by M. Myhalysko (Migalis’ko, 2004), in which there was revealed the scandal surrounding the United Nations (hereinafter referred to as the UN) “Oil for Food” programme, which involved not only the Russians, but also representatives of many countries, as well as some UN officials and a former Iraqi leader Saddam Hussein. In 2005, the online newspaper “Dilova Stolytsia” published an article (Ves’ mir, 2005), which provided information about the scandal regarding how the Iraqi government sold oil at a low price, for which it received “kickbacks”, and it was also indicated which Russian companies and politicians made money from Iraqi oil. At the same time, it is noted that since 2003, the role and services of the Russian company “Orel-Antiterror” in Iraq have increased significantly.

Since 2014, interest in Russian PMCs has been growing again. For example, on the website of the newspaper “Kont” there was published an article by V. Selivanov (2014), which covers the history of the Russian PMCs operating at that time, and in “Voenno-politicheskoe obozreniye” there is an article about PMCs as a very effective tool of influence (ChVK – jeto, 2014). In 2015, the publication “Crime” published an article about the Kremlin’s mercenaries, in particular about the “Tiger Top-rent Security” detachment of the Russian PMC (Tigr Top-rent sek’jurit, 2015).

In 2017 – 2019, a number of publications were published in various periodicals about the origins of some Russian PMCs and how they ended up in the Middle East (B’orn Vysokij, 2017; V livijskoj armii, 2017; Mihajlova, 2018), how they will “raise the image of the country”, about the selection and activities of the PMC “RSB-Group” and the “Tiger Top-rent Security” unit (My podnimem imidzh, 2018; Chto za kompanija, 2018; Anton Tosh, 2018). In 2019, several publications were published dedicated to PMC “Vega”, its origin and activities (V Sirii dejstvujut, 2019; V Sirii pojavilas’, 2019; ChVK “Vega”, 2019; Andriukaitis, & Sheldon, 2019).

In 2021, materials dedicated to PMC “RSB-Group” were published (Kompanija ChVK, 2021) and analysis of the activities of Russian PMCs in Africa. In 2023, the portal “Word and Deed” published materials about Russian PMCs and named the countries in which they operate (Riefer, 2021) (Yaki pry`vatni vijs`kovi kompaniyi, 2023), as well as the material on “Grey Dynamics” about the services provided by PMC “Vega” (Bertina, 2023). In addition, there are a number of publications dedicated to the Russian PMCs, in particular about “RSB-Group” (O kompanii, 2023; Obshhestvo, 2023), and also “Anti-Terror-Eagle” (Shho ce za kompanija, 2023) and “Moran Security Group” (Moran Security Group, 2023).

We used some methodological recommendations for conducting the study from the publications of Vasyl Ilnytskyi, Mykola Haliv, and Volodymyr Starka (Ilnytskyi, & Telvak, 2018; Ilnytskyi, & Haliv, 2019; Ilnytskyi, Starka, & Haliv, 2022).

The purpose of the article is to do the research and reveal the creation of the first private military and security companies in the Russian Federation (1998 – 2013) as a modern mercenarism phenomenon of previous generations.

Results of the Research. The basis for the formation of the majority of PMOCs in the Russian Federation were former servicemen of the law enforcement agencies who were unable to adapt to civilian life after being discharged from military service. Some of the PMCs ceased their activities for various reasons, but their mercenaries, who had a significant practical experience, became the basis for new similar formations. Another important aspect was that the Russian PMCs were created, as was often declared, to protect “state interests,” but in fact to satisfy business interests of certain oligarchic groups. That is why, they became a tool for “racketeering” natural, financial, production and other resources both within the country and abroad. For example, it is believed that the first such company was the private non-state security company “Orel-Antiterror”, registered in 1998 in the city of Orel (the RF). It should be noted that in some sources, in particular (B’orn Vysokij, 2017; Shho ce za kompanija, 2017 та ил.), this company belongs to the PMC. It should be noted that the status of this company as a security company is spoken about by its founder, Sergey Isakov, former vice-president and deputy chairman of the board of directors of Vnukovo Airlines (Mihajlova, 2018). This company recruited military personnel who had retired to the reserve, primarily from special forces units of the Main Intelligence Directorate (GRU) of the General Staff (GS) of the Armed Forces (AF) of the Russian Federation, the “Vympel” group (Boltunov, 2003) and the Navy. For example, after receiving a contract to raise ships that sank in the port of Basra, the company “Orel-Antiterror” created its own unit of combat swimmers (Selivanov, 2014). No information has been found about the level of payment for their services, benefits, contract terms, and possible compensation in case of death. It is practically closed. The mercenaries were trained according to adapted programmes developed in the Soviet special forces of the Committee for State Security (KGB) of the USSR (Mihajlova, 2018).

The company “Orel-Antiterror” began its activities in Iraq, which at that time was under a trade and financial embargo imposed by the UN Security Council in 1990 after its invasion of Kuwait (Resolution No. 661) (Rezolyuciya 661, 1990; Kasinjuk, 2016, pp. 128–129). Thus, in 1996, within the framework of UN Security Council Resolution 986, the UN Oil-for-Food programme was launched, which provided for mitigating the consequences of international sanctions. It gave the then Iraqi authorities the opportunity to export oil under international control and in return purchase food and humanitarian goods for the country’s population (Rezolyuciya 986, 1995; Slobodian, 2013, pp. 122–123). As S. Isakov noted, “we all heard about Baghdad, ... Someone also saw real business opportunities...” (Mihajlova, 2018). Therefore, in 1999, the company “RIC” (in Russian: “Russian Engineering Company”) was established, through which food supplies were sent to Iraq and cheap oil in return. In accordance with the license received, the company “Orel-Antiterror” began to provide protection for industrial facilities, in particular oil pipelines, mineral deposits, seaports, escorting convoys and ensuring the protection (delivery) of cargo. In addition, it took on the retraining of Iraqi special forces, patrolling embassies, and protecting diplomats and private individuals. At the same time, the Russian airline “Vnukovo Airlines” received a monopoly on air services between Iraq and the outside world (Mihajlova, 2018). Thus, the Russian Federation, which saw great business opportunities after the withdrawal of the American military contingent from Iraq (Khamrai, 2012, pp. 204, 223), entered the Iraqi market through private structures.

It should be noted that business opportunities in Iraq were seen not only by the Russian Federation, but also by France, China and other countries, as well as by some UN officials and former Iraqi leader Saddam Hussein, as a result of which the UN was forced to create an independent expert commission to investigate the scandal related to this programme (Migalis'ko, 2004). There is information that the Iraqi government sold oil at a low price, for which it received “kickbacks” worth \$1.8 billion. The largest amount, \$19 billion out of \$64 billion, was earned from Iraqi oil by Russian companies, in particular RAO “UES of Russia”, “Russian Engineering Company”, “Zarubezhneft”, as well as the leader of the Russian political party “LDPR”, Vladimir Zhyrynovsky (\$8.7 million) (Ves' mir, 2005).

In 2003, after the entry of the Multi-National Force in Iraq (MNF-I) and the start of the US Operation “Freedom to Iraq” (UN recognizes, 2008; Syrinska, 2015, p. 116), the role of the company “Orel-Antiterror” increased significantly, as the number of foreign private security and military companies in the country, as noted in some sources, exceeded 400 (Selivanov, 2014). In the same year, a “Non- governmental educational institution – “Anti-terror” Training Centre was established on the basis of the “Orel-Antiterror” company with the assistance of the Union of Paratroopers of Russia, and owing to a direct support of the state leadership, was able to sign contracts with well-known Russian companies, in particular “Tatneft” and “Energoengineering”, on the protection of their facilities and personnel in Iraq in 2005 – 2007. In 2004 – 2007 Centre took part in the defense of international missions in Iraq. A detachment operated under it “Tigr Top-rent Security LTD (registration – British Virgin Islands) (Bogoslavcev, 2009), as it was formed in 2005 and consisted of veterans of the Russian special services (in 2006 it ceased its activities). There were also settlements by Iraqi civilians, supported by a group of security forces from the Iraqi Ministry for Defense. Only in this composition could it solve the tasks assigned to it: escorting convoys, protecting personnel of oil companies, transported cargo, representative offices, diplomatic missions, and other important civilian and military facilities. The group also engaged in sniper (counter-sniper) training of fighters, riflemen, sappers, radio engineers, rapid response fighters and the others. Therefore, its composition included special forces, snipers, sappers, radio engineers and other specialists. The detachment closely cooperated with the security forces of Iraq, as well as with American and British private companies, in particular Blackwater, ArmorGroup, Control Risks, Aegis, and Pilgrim Group (Tigr Top-rent sek'juriti, 2015; Chto za kompanija, 2018). Thus, as noted by I. Bogoslavets, a Russian veteran of UN special missions in Iraq, Israel and Lebanon, experience was gained in the field of protection and security of the Russian business structures, and owing to it, a favourable climate was created for the entry of even more Russian companies into the war-torn region (Bogoslavcev, 2009). Later, other independent “security groups” (actually PMSCs) were formed on the basis of the “Tigr” detachment, which still operate in the Middle East, performing tasks to protect facilities and communications in various missions of Russian companies, the UN, and on behalf of the Iraqi government, as well as in Afghanistan (2006 – 2007), Israel, Lebanon, Palestine (2006), North Ossetia, and Abkhazia (2008). Among “security groups” are the following ones: “Redoubt-Antiterror”, “Ferax”, “Moran Security Group” (Moran Security Group, 2003) and the others (Riefer, 2021). Since the beginning of the war against Ukraine in 2014, the mercenaries of these PMCs, which we will consider below, have “emerged” in the Ukrainian Crimea and Donbas, albeit in a different capacity. The scope of activity of the company “Orel-Antiterror”, which is not included in governmental structures and has become an entirely independent organization with powerful staff and funding, has expanded its activities to Africa (Nigeria,

Sierra Leone, Angola) and India. The company's representatives also operated in the Balkans, demining the area. For example, in 2008 – 2009 a group of sappers from the “Orel-Antiteror” company demined the area of approximately 1 square. km near the airport of Niš in Serbia (more than 450 pieces of ammunition were destroyed), and in 2009 almost 1.5 sq. km near the city of Parachyn, where the “Pivdenny Potik” (“South Stream”) main gas pipeline was supposed to pass (B'orn Vysokij, 2017; Shho ce za kompanija, 2018). Therefore, the Russian Federation, which at that time did not officially participate in operations in Iraq and other countries through private military (security) companies (PMSCs), could pursue its foreign policy and, above all, economic interests there.

Over the course of ten years, starting in 1998, more than ten PMCs were created in the Russian Federation, which were usually headed by veterans of Russian special services, in particular the Federal Security Service (FSB) of the Russian Federation, the GRU of the General Staff, and, accordingly, were closely connected with them. This is, for example, the PMC “RSB-Group” (“Russian Security Systems”), which was created by a reserve officer of the Border Service of the FSB of the Russian Federation Oleh Krynitsyn (the company's general director) and registered in Moscow in 2011 (My podnimem imidzh, 2018). In June 2022, the Office of Foreign Assets Control – a division of the U.S. Treasury Department that deals with financial intelligence, planning, and the application of economic and trade sanctions to support U.S. national security and foreign policy objectives, states that “RSB-Group” is a PMC and is closely linked to Russian special services, employs highly qualified Russian special forces fighters, including veterans of Russian special services. The company provided services for Russian companies in close coordination with the Russian FSB, including servicing military aircraft in Libya (Lin, 2016). In response, the head of “RSB-Group”, O. Krynitsyn, noted that “the task of our company is not attacking, but deterring. That is, we prevent seizures, attacks, etc., and if necessary, we enter into fire contact. Can we be called a PMC? More likely yes than no” (ChVK – jeto, 2014).

The activities of the “RSB-Group” PMC have several directions: land and sea. It provides military consulting services in high-risk areas, in particular, areas of increased terrorist threat, in areas of military operations, as well as in areas of the Indian and Atlantic Oceans (primarily the Gulf of Aden), where there is a threat of attacks by sea pirates. At sea, this includes armed protection, escort and security of civilian vessels, and conducting security audits of oil and gas offshore platforms. On land, its specialists work in Arab countries, conducting reconnaissance, VIP protection, escorting vehicle convoys, and securing facilities, including radar and IT security. The company also works in the areas of demining (Caucasus, Afghanistan, Serbia, Iraq), a high-level competitive intelligence and analytics (Obshhestvo, 2023; Krinicin, 2023; Kompanija ChVK, 2021). For example, employees of the “RSB-Group” PMC participated in the demining of one of the largest cement plants in Libya in Benghazi, which belongs to the Libyan Cement Company. The contract amount, according to media reports, was \$10 million (V livijskoj armii, 2017).

To perform tasks on the territory of the Russian Federation, the reserve of the “RSB-Group” PMC operates a licensed private security company (PSC), the Limited Liability Company (LLC) “Private Security Organization “RSB-Group” for information and analytical support – a private intelligence company. To perform special operational tasks in the territories of other states, a personnel reserve of about 250 people has been created, which includes reserve officers of special forces units of various branches of the armed forces who have extensive personal combat and operational experience gained in military conflicts both

in the Russian Federation and abroad (O kompanii, 2023). Legally the company purchases and stores weapons (semi-automatic rifles chambered for the NATO cartridge 7.62×51) and equipment (body armor, helmets, spare magazines, first aid kits, “night lights”, binoculars, satellite phones, walkie-talkies, etc.) outside the Russian Federation (Anton Tosh, 2018). The “RSB-Group” has a regional office in Senegal and representative offices in Turkey, Germany and Italy. The units of this private military company simultaneously operate in the Middle East, Africa, Central Asia, the Atlantic and Indian Oceans. The mercenaries of the “RSB-Group” were deployed in Sri Lanka, Libya, Aden, Malacca and Guinea Straits (Yaki pryvatni vijskovi kompaniyi, 2017; TOV, 2023).

The main motive for working for the “RSB-Group” PMC, as the analysis of sources showed, is earnings. The mercenary’s salary is not officially disclosed. There is information that for cargo escorting it was \$80–120 per day (insurance \$250 thousand) (Tosh, 2018), and in the “green zone” of Iraq \$300–500 per day (B’orn Vysokij, 2017). The mandatory criteria for hiring at PMC “RSB-Group”, in addition to those listed on its official website, as noted by company employee Hennadiy Kozachkov, are: recommendation from a trusted person whose opinion is authoritative for the company’s management (if a candidate shows himself from a negative side, not only he will be fired, but also a person who recommended him); knowledge of languages (English is always welcome, and Spanish, French, Arabic – depending on the region of task performance); “the ability to perform assigned tasks without creating problems, responsibility, restraint and composure in any situations. Professional training is a given. The RSB-Group” company selects the best candidates among the available candidates, because as the mercenaries testify, among the veterans of military conflicts “there are many who have problems with their “head” and discipline” (Tosh, 2018).

Employees of the “RSB-Group” PMC do not participate in armed conflicts as mercenaries, and do not consult organizations and groups that have any relation to terrorist organizations (Kompanija ChVK, 2021; Zvonok, 2018). The analyzed sources do not contain information about the participation of the “RSB-Group” PMC in the Russian Federation’s war against Ukraine. As the mercenaries note, participation in this conflict can be a significant obstacle to employment (Tosh, 2018; Zvonok, 2018). However, the “RSB-Group” PMC, in coordination with Russian intelligence services, provides services to Russian defense and related companies, thereby directly or indirectly contributing to or supporting the violation of the sovereignty and territorial integrity of Ukraine (the company is under international and Ukrainian sanctions) (SShA vveli, 2022).

The international corporation “Vegacy Strategic Services Ltd” (“Vega”) occupies a certain place in the global market of private security business, which was founded in 2011 in Mykolayiv (Ukraine) by the Ukrainian citizens Anatoly Smolin and Andriy Kebkalo initially as “Vega Strategic Services”. A year later, in 2012, the company began its work in the Russian Federation (headquarters in Moscow) and received official, but offshore, registration in Cyprus under a new name – “Vega”. Its employees were veterans and former servicemen of special naval, army and police units of Ukraine and Russia, who had significant experience in participating in missions and operations in the so-called “high-risk regions” (ChVK “Vega”, 2019; Bertina, 2023).

It should be noted that in some sources it is called the first “classic” private military company. For example, its co-founder Andriy Kebkalo said in an interview: “The idea of creating “Vega” was based on the desire to provide the first Ukrainian PMC at the international market” (V Sirii pojavilas’, 2019). But the Security Service of Ukraine notes that “Vega” has no relation to “private military companies”. Its scope of activity is related to the work of private security firms and related services aimed at identifying, locating and preventing

potential threats to the security of individuals and legal entities, particularly at sea (armed maritime security). The company has its official representative offices in Malta and Panama, as well as official agents in Greece, the Russian Federation, the Czech Republic, the Republic of South Africa, Sri Lanka, the Maldives, Madagascar and many other countries in Southeast Asia, the Indian Ocean, the Black and Mediterranean Seas, and is one of the few security companies in the world that uses its own weapons (Andriukaitis Lukas, Sheldon Michael, 2019; V Sirii dejstvujut, 2019; Moj tranzit, 2014; ChVK “Vega”, 2019).

“Vega” denies its involvement in the war in Ukraine. However, there is information that since 2016 it has been recruiting mercenaries for the “Wagner” PMC through Russian-controlled security structures. According to the SBU, its Moscow branch, headed by a former citizen of Ukraine from Odesa, Dmytro Dzhynikashvili (in September of 2013 he left for Moscow, where he joined the ranks of the “Slaviansky Corps” PMC and personally participated in the hostilities in Syria, in 2016 – 2017 in the Central African Republic he was a medical instructor in the “Wagner” PMC), in early 2014, was actively used by Russian special services as a cover structure for recruiting mercenaries to participate in the hostilities in Ukraine (V Sirii dejstvujut, 2019). Since the summer of 2018, the company “Vega” has been operating in Syria at the invitation of the Syrian government. It is assumed that there it cooperated with the command of the Russian troops in Syria. It did not participate in the hostilities, but provided security and personal protection for VIPs and various facilities, and was also engaged in training the Palestinian-Syrian group “Al-Quds Brigade” (another name “Jerusalem Brigade”; in Arabian – *فيسدقلا ءاول* Liwa al-Quds), which, as the Lebanese independent newspaper “Al-Modon” notes, is supported by Russia and operates in the Syrian province of Aleppo (Fighting in Aleppo, 2019). The financing of this company’s activities, particularly in Syria, is not disclosed. This may be using profits to cover operating expenses and reinvesting them in market expansion (Bertina, 2023). Thus, from the above mentioned, we can conclude that the company “Vega” has certain connections with the Russian state. Although it did not participate in the hostilities on its behalf, as, for example, the “Wagner” PMC did, it nevertheless “cautiously cooperated” with it, in particular providing services to the governments of countries loyal to and supported by the Russian Federation.

Conclusions. The practice of mercenary warfare and military conflicts, as well as the involvement of military specialists on a contractual basis, has a centuries-old history. The widespread use of PMCs in modern wars is closely related to the hybridity of their actions. The changes that have occurred in the world since the end of the Cold War have prompted a rapid development of the private military industry. Since then, PMSCs have become a very promising and attractive business.

In the article there has been analyzed and revealed the creation of the first Russian PMSCs from the late 1990s to the early 2000s. In particular, it has been determined that the first Russian private companies to be created during the period under study were “Orel-Antiterror”, “RIK”, “Ferax”, Moran Security Group, “RSB-Group”, “Vega”, “Slaviansky Corps”, and “Wagner”. It has been determined that the emergence of such structures has significantly expanded the Russian Federation’s ability to project its influence militarily not only in Transnistria, the North Caucasus, and Yugoslavia, but also in Ukraine since 2014 and in Syria since 2015, using hybrid influence and methods that the state cannot officially use.

A promising direction for further research on this issue may be research on the creation of paramilitary organizations and volunteer units in the Russian Federation, as well as their use in military conflicts (1991 – 2016).

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**MEMORIAL LEGISLATION OF EASTERN EUROPEAN COUNTRIES:
BETWEEN ETHNOPOPULISM AND MNEMONIC SECURITY¹**

Abstract. *The purpose of the research is to identify the main directions of memorial legislation development in Eastern European countries at the present stage, in particular, in the context of determining its functioning in the coordinates of the ethnopopulist rhetoric growth of the respective political regimes and clarifying the degree of mnemonic security, which we could come across in the memorial legislation. Scientific Novelty.* Regarding the idea that memory management in contemporary politics has important ramifications for the retreat from democracy, the Eastern European region offers food for thought. At the same time, the analysis of the Russian, Polish and Ukrainian legislative regulation of historical memory emphasizes that the “wars of memory” are unfolding as proxy wars for modern state identities and the sense of the states security as actors of a special kind. Eastern Europe has become the “main laboratory” for studying the interrelationships between law and memory since the mid-2000s. Memory wars have broken out in the Russian-Ukrainian-Polish triangle, and historical politics, including memory laws, have become the weapon that regimes consciously relied on in their propaganda. The countries in the region have struggled for the mnemonic acknowledgment in the global social hierarchy of remembrance of the major historical events, as evidenced by their memorial laws. **Conclusions.** Due to determining the main directions of functioning in the mnemonic space of Europe regarding memory laws in the countries of its eastern part, it is feasible to bring up their striking difference from the generally accepted policy of memory in the EU. The tangible ethno-populist rhetoric is considered to be one of the controversial issue, which is inherent in such memorial legislative acts. On the other hand, the example of modern Ukraine, which is in a state of fierce and hostile war with Russia, allows us to realize the powerful potential of the mnemonic security of such legislation more deeply.

Key words: *Eastern Europe, memorial legislation, memory laws, historical politics, historical memory, ethno-populism, mnemonic security.*

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МЕМОРІАЛЬНЕ ЗАКОНОДАВСТВО КРАЇН СХІДНОЇ ЄВРОПИ: МІЖ ЕТНОПОПУЛІЗМОМ І МНЕМОНІЧНОЮ БЕЗПЕКОЮ²

Анотація. Мета – висвітлення основних напрямів розвитку меморіального законодавства країн Східної Європи на сучасному етапі, зокрема в контексті визначення його функціонування у координатах зростання етнопопулістської риторики відповідних політичних режимів та з'ясування ступеня мнемонічної безпеки, що містять у собі закони про пам'ять. **Наукова новизна.** Регіон Східної Європи дає багато інформації для роздумів стосовно того, що управління пам'яттю у сучасній політиці має вагомі наслідки для відступу від демократії. Водночас аналіз російського, польського та українського законодавчого регулювання історичної пам'яті підкреслює, що “війни пам'яті” розгортаються як проксі-війни за сучасні державні ідентичності та відчуття безпеки держав як акторів особливого роду. Від середини 2000-х рр. Східна Європа стала “головною лабораторією” для вивчення взаємозв'язків між законом і пам'яттю. У російсько-українсько-польському трикутнику спалахнули війни пам'яті, а історична політика, включаючи закони пам'яті, стала тією зброєю, на яку свідомо поклалися боротьбу за статус мнемонічного визнання у міжнародній соціальній ієрархії пам'яті про основні події минулого. **Висновки.** Визначення основних напрямів функціонування у мнемонічному просторі Європи законів про пам'ять саме в країнах її східної частини дає підставу вести мову про їхню кардинальну відмінність від загальноприйнятої в ЄС політики пам'яті. Одним із проблемних місць є відчутна етнопопулістська риторика, властива подібним меморіальним законодавчим актам. З іншого боку, якраз приклад сучасної України, що перебуває у стані гарячої агресивної війни з боку Росії, дозволяє глибше усвідомити потужний потенціал мнемонічної безпеки такого законодавства.

Ключові слова: Східна Європа, меморіальне законодавство, закон про пам'ять, історична політика, історична пам'ять, етнопопулізм, мнемонічна безпека.

Problem Statement. Russia's unprovoked aggression against Ukraine in February of 2022 proved that such an abstract phenomenon as a “memorial war” may develop into a very real and hostile war. One of the components of the “wars of memory”, which became especially acute in Eastern Europe over the past decade, is the memorial legislation that is designed to fix the historical policy legally inherent in each of the states of the region. The above-mentioned situation outlined numerous difficulties caused by the relevant memory laws. In addition to the significant issues on the single European mnemonic space formation, it turned out that many such acts are based on the ethno-populist rhetoric designed to strengthen the respective nationalist regimes. On the other hand, the case of Ukraine demonstrated that memorial legislation has a powerful potential for mnemonic security as a tool for countering an aggressor state. Another aspect of studying the system of on memory laws in the Eastern European space is the importance of Ukraine taking into account its positive and negative sides, primarily given the high pace of its European integration and the need for synchronization with EU legislation.

Review of the Recent Research. The issue on studying the memorial legislation gained considerable popularity in the European sphere of humanitarian understanding of memory policy. Although there are not any comprehensive interpretations regarding the above-mentioned issue in Ukrainian historiography. It should be noted that the study on the above-mentioned issue was covered by the following domestic scholars: Heorhii Kasianov (Kasianov, 2018, Kasianov, 2022), Alina Cherviatsova (Cherviatsova, 2020), Svitlana Koch (Koch, 2018). The topic on the memorial legislation was analyzed by the following Western

² Статтю підготовлено в межах держбюджетної теми “Протидія історичній політиці країни-агресора РФ у процесі деокупації українських територій” (номер державної реєстрації 0123U101598).

scholars increasingly as Uladzislau Belavusau (Belavusau, 2023, Belavusau U., Gliszczyńska-Grabias & Mälksoo, 2021), Marta Bucholc (Bucholc, 2019), Anna Wójcik (Wójcik, 2023), Aleksandra Gliszczyńska-Grabias, Nikolaj Kuposov (Kuposov, 2018, Kuposov, 2022), Daniel Lucksted (Lucksted, 2022), Karl Gustafsson, Maria Mälksoo (Mälksoo, 2021b, Gustafsson & Mälksoo, 2024). In particular, both specific legal systems of countries in the Eastern European region are being covered in their works as well as their common features, general regional specificity, individual components and functions inherent in local memory laws are being compared, which form a specific regional mnemonic space.

The purpose of the research is to analyze the main directions of the memorial legislation development in Eastern European countries at the current stage, in particular in the context of determining its functioning in the coordinates of the ethno-populist rhetoric growth of the relevant political regimes and clarifying the degree of mnemonic security, which are in the memory laws.

Results of the Research. Over the past ten years, memory laws have developed in Eastern European countries actively, prompting memory studies experts to refer to this area as a distinct “region of memory” with its own model (Olick, 2016, Mälksoo, 2023b). As a result, the process of creating a pan-European mnemonic unity is seriously hampered. It is well known that Western Europe has been enacting memory laws since the middle of the 1980s with the intention of outlawing the Holocaust denial (“the Gayssot Law” of 1990 is the classic example in France). However, the expansion of the European Union (EU) to the East led to a clash of memories due to the fact that the East’s narratives differ from the Western interpretation of the past significantly, especially regarding World War II. Russia became another “mnemonic region” in the context of the memorial legislation formation at this stage (Ivanhorodskiy, 2023). Hence, it shows how variable and asymmetrical the memory policies of the European states are, which leaves almost no chance of agreement between them in this area (Gliszczyńska-Grabias, 2014, p. 161). On the other hand, it would be quite useful for the Western European leaders to take the issues on the mnemonic security seriously faced by the traditional “objects” of their power in Eastern Europe in order to understand the methods of the “weak” better (Mälksoo, 2021, p. 888).

In general, the Eastern European region offers diverse material for reflection on the idea that the memory management in contemporary politics has significant implications for the retreat from democracy. At the same time, an analysis of the Russian, Polish and Ukrainian legislative regulation of historical memory highlights that “memory wars” are being waged as proxy wars for contemporary state identities and the sense of states security as special kinds of actors (Belavusau, Gliszczyńska-Grabias, & Mälksoo, 2021, p. 114). The way that the past is remembered became a key component of comprehending current political events inside and between governments in Eastern Europe. According to F. Krawatzek and G. Soroka, Eastern Europe is a fascinating area to study. That is why, much attention should be paid to both the content and dynamics of memory policies in the region, as they often differ from those prevailing in the former “Soviet states” and Western European states. Furthermore, these historical narratives are increasingly circulating and reproduced in new contexts through factors such as migration and the growth of transnational media. Nevertheless, the post-communist space displays certain distinctive interpretative characteristics relating to its shared experience although there is no homogeneous mnemonic identity (Krawatzek, & Soroka, 2022, pp. 198–199).

Eastern Europe essentially became the “main laboratory” (N. Kuposov) for studying the interrelationships between law and memory since the mid-2000s. The relatively peaceful

international climate began to deteriorate in Eastern Europe rapidly due to the continued rise of populism and the emergence of Putin's authoritarian regime. It triggered an avalanche of mutual accusations of the past crimes among the governments of Russia, Poland, and Ukraine. As the nationalists came to power in all three countries, in the following years they were faced with the need to consolidate their support with increasingly ethno-populist rhetoric. Memory wars broke out in the Russian-Ukrainian-Polish triangle, and historical politics, including memory laws, became the weapon that the three regimes relied on in their propaganda consciously (Koposov, 2022, p. 279). There are different types of populism, including ethnopopulism, the rise of which marked the turn of the 21st century profoundly, especially in Eastern Europe (Müller, 2016, pp. 7–9). In contrast to Western Europe, some Eastern European memory laws are a product of ethnopopulism. Russia is a vivid example of this trend, although similar memory policies can also be observed in Poland, Hungary, and Turkey (Koposov, 2020, p. 114). The ethnopopulists whitewash the history of their countries persistently, forming a new type of memory laws that primarily shift the blame for historical injustice to other states, and also try to promote their national narratives (which, it seems, are undeservedly deprived of attention) into the mnemonic space of the EU. According to M. Bucholc, despite the Western European experience dominance in the conceptual focus of memory research thus far, memories of Eastern European societies are gaining more and more space in the European narrative, improving scientific understanding of the fundamental interdependence among collective identities, collective memory, memory politics, and historical politics (Bucholc, 2019, p. 87).

The politics of history permeates Eastern Europe, a region where conversations within and between states are always conducted in terms of the past and its contemporary, politically conditioned assessment (Soroka, 2022, p. 328). In the so-called “post-Soviet” space, memorial legislation is aimed primarily at achieving a political result and as a tool for legitimizing power by consolidating certain interpretations of past events. In addition, it captures the spirit of “geopolitical” confrontation between neighbouring countries, where mutually exclusive interpretations of the historical events are legally enshrined (Russia, Ukraine, Poland, Israel) (Ivangorodsky, 2023, p. 84). In addition, memory laws serve as both a shield and a sword in the context of memory wars unfolding in the region. It allows experts to characterize such laws as a means of “mnemonic search for security”, to fix at the state level a clear understanding of the past in order to strengthen stable self-consciousness of the nations (Belavusau, Gliszczyńska-Grabias, & Mälksoo, 2021, pp. 97–98). The most vivid examples of the mnemonic management techniques used in recent years in nations like Russia, Poland, and Ukraine are those that use militant rules of memory in order to guarantee a politically improved version of the past. Nevertheless, it is essential to take into account the purely historical peculiarity of their interactions over the ages, which culminated during World War II. At the same time, the historical legacy of the Russian-Ukrainian relations is crucial to comprehending the necessity of mnemonic security in Eastern Europe nowadays.

There is a struggle among three nations for the mnemonic recognition in the international social hierarchy of remembering significant historical events is also evident in their memorial laws. Empirically, this argument is placed against the background of respective attempts made by Russia, Poland and Ukraine to seek status through their recent mnemonic laws (Mälksoo, 2021c). According to M. Mälksoo, Russia demonstrates “mnemonical positionalism”, Poland – “mnemonical revisionism”, and Ukraine – “mnemonical self-emancipation” in the typology of mnemonical status-seeking. In this case, the laws of memory provide a general

example of securing and/or improving the mnemonical position of a state in the corresponding order of memory. The scholar brought in the notion of the “militant memocracy,” i.e. the management of historical memory through a dense network of laws and policies of memory that prescribe and prohibit, based on the conceptual comparison of “militant democracy”. The “war of memories” in Eastern Europe, however, forms a distinct regional dynamic, as the respective national memories of the victims and the shared historical experience of being the victims of the Soviet injustices act as a source of solidarity precisely in the face of the revisionist Russian narrative of World War II (Mälksoo, 2021b, pp. 489–490). By projecting an imaginary “wholeness” onto an idealized past, militant laws of memory, thus, reinforce claims to preserve national unity in the present, often reflecting dissatisfaction with liberalism and helping mobilize politics and transnational commitment aimed at destroying its core features.

The European order of memory is not a monolith, and therefore, due to the eastern enlargement of the EU, it began to lose its dominant coherence (the main culprit is the Nazi Germany, the main crime is the Holocaust), as the new members brought to it a clear emphasis that they also suffered during the war, but not only from the Nazis, but also from the Communists. In this context, the above-mentioned types of searches for the mnemonical status demonstrate a noticeable similarity in their desire for the legal institutionalization of the respective official narratives of memory. Hence, the memory laws on Russia, Poland and Ukraine seek to protect an exclusive national self-image, offering rather simplified narratives of the past, where the titular nations are depicted only as victims or heroes, in order to ensure a modern state identity. Hence, the militant memocracy seeks to create and control heroic or sacrificial fantasy of a particular nation owing to memory laws and is aimed at disciplining and punishing anyone, who threatens such idealized self-image (Mälksoo, 2021b, pp. 504–505). It is also related to the effect that M. Mälksoo offered to define as “securitization of historical memory” (Mälksoo, 2015, p. 222). It assumes that “our” narrative is maliciously misunderstood and distorted by others, and therefore their vision of the past is existentially dangerous to our existence as “us”.

Hence, there is a tendency to reproduce mutual insecurity and a constant renewal of historical hostility. Furthermore, the state can legitimize the use of force and violence to protect its “memory” in such a situation. When the past becomes an object of the national security, governments are the key actors in historical policy, and authorities are mobilized to protect dominant narratives and legislative regulation of the interpretation of past events is introduced. Therefore, the securitization of memory is often accompanied by restrictive and prohibitive measures. For instance, Russia’s historical policy of recent decades considers memory and history as an existential threat, and there were made attempts to revise the Soviet-Russian vision, which are certainly rejected in the Kremlin as an encroachment on the sovereignty of the Russian Federation and deprivation of its status as a victorious state (Latysh, 2022, p. 181). Therefore, there was a dilemma regarding the mnemonic security in the Russian-Ukrainian relations – the historical narrative that legitimizes the Ukrainian state and consolidates the nation is systematically denied by Russia, which led to memory wars. The securitization of memory is also observed in Ukraine, but in the context of a full-scale war, its historical policy looks like a completely justified step.

One of the negative consequences of the memorial legislation of Eastern European countries is that they move away from the rule of law, simultaneously with the growth of the nationalist politics of memory. For instance, Hungary and Russia have made Historical

Memory a subject of their constitutions. In both countries, these constitutional changes were implemented with the help of the referendums and were intertwined with openly populist “anniversary legislation” (Belavusau, 2020). Since the 2010s, memory laws in the region became the instruments of the mnemonic security in order to strengthen the sovereignty of individual countries in the face of the increasing Russian propaganda. The legal rehabilitation of Stalinism is at the heart of the Russian propaganda, along with the whitewashing of the Soviet expansionism, which follows Putin’s dangerous rhetoric on fomenting the post-Soviet imperialism, to justify the Russian military aggression and intervention in the region (Belavusau, 2023, pp. 72–73). As it is known, Putin’s ideology is based on the Stalinist myth of the Great Patriotic War, which includes the idea of an exclusively peaceful nature of Russia’s foreign policy (Koposov, 2018).

The Western scholars note decently that Russia has a special history associated with the control of its historical narrative. Mnemonic conflicts in Eastern Europe intensified especially after the re-election of V. Putin as the President in 2012. The culmination of this was his infamous address on February 21, 2022, 3 days before the invasion of Ukraine began. After all, this was not just rhetoric, his statements had real consequences, which, as we have seen, are manifested through the blatant weaponization of fictional narratives in the “legitimization” of Russia’s hostilities against Ukraine (Lucksted, 2022, pp. 1455–1456). The Russian aggression against Ukraine proved once again that mnemonic wars go beyond the symbolic sphere and can lead to the physical violence and military conflicts. V. Putin used made-up historical justifications in order to support and legitimize the impending invasion, denying Ukraine its right to the national sovereignty. In a nutshell, what his statement illustrates is typical of many populist and right-wing movements worldwide, not just the Russian politics. Mnemonic wars are waged by populist forces in order to strengthen the national identity and bring societies together against adversaries both inside and beyond the country (Saryusz-Wolska, Wawrzyniak & Wóycicka, 2022, p. 1276).

One of the specific features of the Eastern European memorial legislation is precisely the policy of decommunization. Russia is the exception to the above-mentioned. There should be the split with the Communism in Eastern Europe, which involves primarily the struggle for the national liberation, in which the democrats and the nationalists are allies. Hence, the phenomenon of the liberal nationalism or national liberalism, which is so typical of this region and so clearly distinguished from the national populism. As a result, decommunization became an ambivalent phenomenon, with both democratic and nationalist components. In particular, in some post-communist countries, a noticeably different culture of memory emerged, seeking to promote its national narratives rather than a “cosmopolitan”, EU-driven historical memory. Poland was the first country to outlaw the denial of both the Nazi and the Communist crimes under the 1998 Law on the Institute of National Remembrance, which was also the first case of an outright ban on certain claims about the past in Eastern Europe.

In fact, Poland created a role model regarding the memory law that was an alternative to the model in Western Europe, since the latter did not take into account certain issues typical of the Eastern European countries, arising from their respective historical peculiarities. The legacy of Communism is usually accepted there as a particularly important issue, while the collaboration of local population with the Nazi and communist regimes is systematically downplayed. This decisive denigration played a role in the memory wars of the following decades. It also explains partly the “failure to create a pan-European memory project” (Koposov, 2022, pp. 276, 278). Poland’s example was soon followed by the other countries,

including Lithuania, Latvia, Hungary, the Czech Republic, and Ukraine, as they have a particularly strong history of the anti-Soviet resistance and were immediately drawn into fierce conflicts with Russia over the interpretation of the past. At the same time, the practices of “monopolizing” public opinion with the help of historical narratives created by the state institutions and memorial legislation are not only a form of destruction of the liberal democracy, but also a mechanism for ideological justification of geopolitical practices of “expansion” (Koch, 2018, p. 49).

According to Robert Kahn, by reinforcing the state nationalism the memory laws also increase international tensions, as country A reacts to country B’s narrow memory law by introducing its own law, triggering a mnemonic arms race in which each country seeks to control the truth as it sees it, within and beyond its borders (Kahn, 2018, p. 46). Furthermore, the chain reaction on the introduction of the memorial laws in Russia, Ukraine, Poland and Israel is a vivid example of how a “mnemonic arms race” can spread in a particular region in the second half of the 2010s. At the same time, the memory laws can be an integral part of hybrid strategies for engaging the internal and external opponents of the state, just as “memory wars” can demarcate the previous phase of a kinetic conflict, as clearly demonstrated by Russia’s current war in Ukraine. Since 2014, Russia’s efforts towards political legislation on memory have been parallel to its conflict with Ukraine and have been particularly intensified after the annexation of the Crimea and intervention in Donbas. Declaring the containment of “nationalist” memories in the former Soviet space and protecting the borders of its own imperial/Soviet narrative of memory, Russia’s self-justifying memory laws have become international, not just domestic, means of political persuasion in the ongoing disputes over legitimate political memory of World War II and the Soviet legacy in general. The current full-scale Russian aggression against Ukraine can also be repected as a political containment of memory through punishment with the use of force, including to protect Russian “state history” (Gustafsson, & Mälksoo, 2024, pp. 7–8).

The Russian aggression is an imperial war in a world of nation states, supported by Russia’s open denial of Ukraine’s political sovereignty and the right of the Ukrainians to exist as an independent nation. In this conflict, the incompatible logics of sovereignty (Ukraine) and imperialism (Russia) clash. At the same time, once again we witness a postcolonial moment that reveals the distinctly Eurocentric nature of theorizing in memory studies and its relative disregard for the Eastern European ideas, the validity of their experience, and the intellectual laziness in assessing (allegedly) smaller actors in world politics. It is also symptomatic of a not-yet-decolonized model of thinking about Eastern Europe as a region whose sovereign space is supposedly always defined by stronger or supposedly more responsible and rational others (Mälksoo, 2023, pp. 471–472). And if Eastern Europe always suffered from the difference issues with its Western counterpart, the case of Ukraine as a “secondary Europe with a secondary colonial difference” (or an intermediate zone – “The East of Europe, the West of Russia”) is traditionally even more acute compared to its Central European neighbours. In Western academia, Ukraine was so far “too European for a Russian history course and too Soviet for a course on Eastern Europe”.

The reaction to Russia’s current war against Ukraine also revealed the long and unprocessed legacy of the Russian imperialism in the minds of many in the Western world when it comes to recognizing a distinct Ukrainian subjectivity. Unfortunately, the Russian imperialism and colonialism remain one of the blind spots of the academic field of memory studies and broader postcolonial studies (Mälksoo, 2023, pp. 473–474). Ukraine still seems

to occupy a subordinate position in the international community, i.e. the position of the “subordinate”. Ukraine is “orientated” as an unknown country and always in the shadow of Russia, which does not recognize its right to “difference”. This is a fairly typical reaction from a former colonialist, but what is surprising is that Western European societies still seem to believe in this view. Western media display considerable ignorance about Ukraine, making them prone to accepting Russian propaganda’s portrayal of the Ukrainians as the essentialist nationalists. It seems that Ukraine still has a long way to go to become a recognized political entity and leave its post-colonial state behind (Törnquist-Plewa, & Yurchuk, 2019, p. 714).

The spread of memorial legislation across Europe is in line with global trends in the legal protection of memory. However, while cosmopolitan historical memory prevails in the Western part of the continent, recent memory laws in Russia (2014) and Poland (2018) clearly demonstrate their new nationalist paradigm as a mnemonic weapon in the ongoing wars over memory. Furthermore, memory laws are now being used as the mnemonic tools to reinforce existing legal standards (Lucksted, 2022, p. 1450). According U. Belavusau: “illiberal democracies” seem particularly eager to return to the populist identity formation under the guise of the memory politics, introducing nationalist historiography. At the same time, the author wrote quite decently the following: “despite the fact that in other works I have spoken out against the memory laws, in the end, I came to the paradoxical conclusion that it is the Ukrainian legal acts on decommunization that are currently probably the only memory laws that can be justified in the light of mnemonic security, because Ukraine has to counteract the heavy machine of the Russian media propaganda in a dramatic state of aggression and military occupation of part of its territories. The Polish memory law of 2016 regarding Volyn tragedy is completely untimely against this background, unneighbourly, and even contradicts the logic of mnemonic security, the main task of which now should be to counteract Putin’s aggression and propaganda, and not to harass weaker neighbours (Belavusau, 2018).

Conclusions. In general, the identification of main directions of the memory laws functioning in the mnemonic space of Europe in the countries of its eastern part allows us to talk about their fundamental difference from the generally accepted policy of memory in the EU. One of the problematic areas is the noticeable ethno-populist rhetoric inherent in such memorial legislative acts. On the other hand, the example of modern Ukraine, which is in a state of hostile war with Russia, allows us to understand more deeply the powerful potential of the mnemonic security of such legislation. In the future, it is worth analyzing the memorial legislation of each of the countries of Eastern Europe in more detail, paying attention to the positive and negative aspects of both its application in practice and its impact on the societies of these countries.

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POLISH-UKRAINIAN RELATIONS IN 2014 – 2022: MILITARY DIPLOMATIC VECTOR OF COOPERATION

Abstract. *The purpose of the research is to clarify the Polish-Ukrainian relations formation in the context of the foreign policy concepts of the Republic of Poland and the conditions of the process of activating Ukraine's European integration, Russia's war against Ukraine since 2014. The methodology of the research is based on the principles of historicism, scientific objectivity. There have been used the problem chronological, logical, deductive and inductive methods. The Scientific Novelty.* There have been outlined the main principles of the Polish foreign policy in the article, taking into account the geopolitical concepts developed in previous decades, in particular the modernized ideas of Giedroyc, the “Jagiellonian” and “Piast” doctrines. The role of Ukraine in these geopolitical regional concepts has been analyzed. The system of the military political interaction between Ukraine and Poland within the framework of the trilateral regional alliance “The Lublin Triangle”, the joint military formation “LitPolUkrBrig”. There have been considered various levels of political and military cooperation between Ukraine and Poland in the context of countering the armed aggression of the Russian Federation after 2014, military and technical assistance of the Republic of Poland from 2014 to 2023. **Conclusions.** Intensification of the Polish-Ukrainian relations took place at the turn of 2013 – 2014 in the context of Euromaidan, the Revolution of Dignity, and the Russian armed aggression in 2014. During the period of 2014 – 2022, Poland provided significant support to Ukraine at the bilateral and international levels. The establishment of good-neighbourly relations and military political assistance to Ukraine was implemented by Poland through the prism of implementing the “Intermarium” concept, and later the “Three Seas Initiative”, which reflect a broader geopolitical doctrine that takes into account the historical past and the desire to become one of the dominant powers in Central and Eastern Europe. Since 2015, after the victory of Andrzej Duda in the presidential elections, the parliamentary elections of Jarosław Kaczyński, and even more intensively since 2017, Poland has been abandoning a unilateral policy oriented towards the West. Instead, Poland is implementing a policy of integration of EU member states located between the Adriatic, Baltic, and Black Seas. That is, the interwar project “Intermarium” in the context of the new European geopolitical configuration is transforming into the “Three Seas Initiative” – “Three Seas”. It is worth noting that the security sphere remained a priority in the Polish policy, as evidenced by a number of

initiatives, including the creation of the Lithuanian-Polish-Ukrainian Brigade (“LitPolUkrBrig”); joint military training, “the Lublin Triangle” project. A set of measures that contribute to strengthening military cooperation between states, mastering advanced technologies and training standards of the Armed Forces of Ukraine is extremely important in the context of the full-scale invasion of Ukraine by the Russian Federation in February of 2022 and the threat of further aggression in the region. Therefore, Poland increased its assistance to Ukraine in the military, financial, and humanitarian spheres significantly. From mid-2022 to early 2023, it became the second country after the United States in terms of the scale of military assistance to Ukraine.

Key words: Ukraine-Poland, Polish-Ukrainian relations, Jerzy Giedroyc’s postulates, “Jagiellonian” and “Piast” doctrines, the concept of “Intermarium”, “Lublin Triangle”, Lithuanian-Polish-Ukrainian Brigade («LitPolUkrBrig»), security issues, countering Russian aggression, cooperation in the field of defense, military and technical and humanitarian assistance to Poland.

ПОЛЬСЬКО-УКРАЇНСЬКІ ВІДНОСИНИ У 2014 – 2022 рр.: ВІЙСЬКОВО-ДИПЛОМАТИЧНИЙ ВЕКТОР СПІВПРАЦІ

Анотація. Мета дослідження: розкрити еволюцію взаємовідносин України та Польщі на фоні розгортання російської агресії впродовж 2014 – 2022 рр. Висвітлити особливості становлення оновлених концепцій “Міжмор’я”, “Тримор’я”, та нового проекту “Люблінського трикутника”. Окреслити головні заходи Республіки Польщі, які сприяли зміцненню оборонного потенціалу України напередодні повномасштабного вторгнення РФ та в його перший рік. **Методологія дослідження** ґрунтується на засадах історизму, наукової об’єктивності в оцінках. Використано проблемно-хронологічний, логічний, дедуктивний та індуктивний методи викладу матеріалу. **Наукова новизна.** У статті окреслено головні засади зовнішньої політики Польщі, із врахуванням геополітичних концептів, напрацьованих у попередні десятиліття, зокрема модернізованих ідей Гедройця, “Ягеллонської” та “Пястської” доктрини. Проаналізовано роль України у цих геополітичних регіональних концептах. Окреслено систему військово-політичної взаємодії України та Польщі в рамках тристороннього регіонального альянсу “Люблінського трикутника”, спільного військового формування “LitPolUkrBrig”. Розглянуто різні рівні політико-військової співпраці між Україною та Польщею у контексті протидії збройній агресії РФ після 2014 р., військово-технічної допомоги Республіки Польща від 2014 до 2023 р. **Висновки.** Євромайдан, Революція Гідності стали переломним для Української держави та її зовнішньо-політичної орієнтації на Захід. Польща з перших днів протестів підтримувала проєвропейський вибір українського суспільства, поступово ставши “адвокатом” України у структурах ЄС та НАТО. Збройна агресія Російської федерації у 2014 р. актуалізувала питання безпеки в Центрально-східній Європі, відтак роль Польщі трансформувалася до одного із головних союзників України. У зовнішньополітичній стратегії польська держава переглянула геополітичні концепти “Міжмор’я”, “Тримор’я”. Їхня актуалізація відбулася на тлі докорінних змін у безпековій сфері регіону після 2014 р. Основоположим для розбудови регіональної системи протидії військовим загрозам стали регіональні ініціативи “Тримор’я”, “Люблінського трикутника”. Поглиблення військово-політичного співробітництва України та Польщі стала одним із визначальних елементів системи колективної безпеки в Центральноевропейському регіоні. Суттєвим чинником впливу залишався вектор прокладних кіл. Більш системний рівень підтримки Україні у безпековій сфері Польща надала напередодні повномасштабного вторгнення РФ у лютому 2022 р., надалі допомагаючи посилювати обороноздатність.

Ключові слова: Україна – Польща, польсько-українські відносини, постулати Єжи Гедройця “Ягеллонська” та “Пястська” доктрина, концепція “Міжмор’я”, “Люблінський трикутник”, Литовсько-польсько-українська бригада (“LitPolUkrBrig”), питання безпеки, протидія російській агресії, співробітництво у сфері оборони, військово-технічна та гуманітарна допомога Польщі.

Problem Statement. There were held the presidential elections and a referendum for independence in Ukraine on December 1 of 1991. The Republic of Poland was one of the

first to welcome the Ukrainians and recognize the sovereignty of the state, declaring its desire to establish diplomatic relations on December 2 of 1991 (32 roky tomu, 2023). Since the 1990s, the Republic of Poland has supported the democratic and pro-European changes in Ukraine, considering our state as a guarantee of stability in the region. From the point of view of the geopolitical strategy, Ukraine was supposed to play the role of a buffer zone between Europe and Russia (Pih, & Ruda, 2022, pp. 185–186), hence, our country was one of the priority areas in Poland's foreign policy. The concept of the existence of independent states of Ukraine, Lithuania, and Belarus, which in the future would form "a kind of security buffer that was to protect Poland from possible Russian expansion" arose in the émigré intellectual environment, mainly due to Jerzy Giedroyc and Juliusz Mieroszewski activities. The "Declaration on the Ukrainian Issue", which was published in 1977 on the pages of the Parisian magazine "Culture", became one of the most important postulates that was later used to build the foreign policy strategy of the already post-socialist Poland (Artymyshyn, & Kostiuk, 2020a, pp. 4, 71; Chmelyk, & Khakhula, 2022, p. 219).

The Euromaidan and the Revolution of Dignity became one of the most powerful challenges for the Ukrainian public (Kyrydon, 2015, p. 17). Large-scale protests by the Ukrainians became a top topic for foreign media, including the Polish ones (Nowacki, 2017, p. 108). The Polish politicians expressed concern about the revolutionary events in Ukraine, Polish President Bronisław Komarowski advocated a peaceful settlement of the issues, and Prime Minister Donald Tusk supported the European integration choice of the Ukrainians, calling on the European politicians to be tolerant of the authorities and at the same time support the Ukrainians. At the same time, the Polish political class condemned sharply the violent dispersal of the Euro-demonstrations and the introduction of the so-called "dictatorship squads" on January 16 of 2014. The diplomatic corps of the Republic of Poland insisted on developing a common programme of the European community regarding the events in Ukraine. Owing to the activity of Prime Minister D. Tusk, the European Union formulated a single position on Ukraine. In summary, it can be stated that such activity of the Polish authorities was the beginning of its mediation mission of foreign ministers, which also included representatives of Germany and France. (Artymyshyn, & Kostiuk, 2020a, p. 64).

Review of the Recent Research and Publications. The Polish-Ukrainian relations development in the 1990s–2010s was the subject of numerous publications. It is feasible to single out the following researches conducted by the Polish scholars: Andrzej Chojnowski (Chojnowski, 1997), Jan Draus (Draus, 2011; Draus, 2009), and Ewęgi Kozakiewicz (Kozakiewicz, & Najder, 1997; Kamiński, & Kozakiewicz, 1997; Kozakiewicz, 2000), who studied the partnership relations formation between the states in the 1990s. The foreign policy vectors of the Polish state were covered thoroughly by the Polish scholars Roman Kuźniar (Kuźniar, 2008; Kuźniar, 2005), Józef Fischer (Fischer, 2021; Fischer, 2022), and Beata Ociepka (Ociepka, 2013; Ociepka, 2019). The studies carried out by the Ukrainian scholars should be mentioned among the others, in particular, Stepan Vidnyansky (Vidnyansky, 2011; Vidnyansky, 2018), Ihor Todorov (Todorov, 2006; Todorov & Todorov, 2016), Natalia Buglai (Buglai, 2012; Buglai, 2018), Yuriy Klyuchuk (Klyuchuk, 2016; Klyuchuk, 2017), Kyrylo Mieliekiestsev (Mieliekiestsev, 2014; Mieliekiestsev, & But, 2020) and Lesia Aleksiyevets (Aleksiyevets, 2009), which were dedicated to Poland's strategic partnership and Ukraine, Poland's support for Ukraine's European integration aspirations. Hryhoriy Perepylytsia (Perepylytsia, 2018), Oleh Pikh (Pikh, 2019; Pikh, 2021a; Pikh, 2021b; Pikh, & Ruda, 2022), Oleh Kostiuk and Pavlo Artymyshyn (Artymyshyn, & Kostiuk, 2020a; Artymyshyn, &

Kostiuk, 2020b) studied Poland's foreign policy and Ukraine's European integration in their research. The peculiarities of understanding the full-scale stage of the Russian-Ukrainian war by analysts of the Marek Karp Center for Oriental Studies (Republic of Poland) were studied by Vasyl Ilnytskyi and Vitaliy Telvak (Ilnytskyi, & Telvak, 2023; Ilnytskyi, & Telvak, 2024). Taking into consideration the increase in publications on military political and humanitarian support for Ukraine by the European institutions and states, there is a drastic need for a comprehensive outline of the foreign policy doctrines and strategies of neighbouring states, in particular the Republic of Poland.

The purpose of the research is to clarify the Polish-Ukrainian relations formation in the context of the foreign policy concepts of the Republic of Poland and the conditions of the process of activating Ukraine's European integration, Russia's war against Ukraine since 2014.

Results of the Research. In 2014, after the Presidential elections and the inauguration of the new President Petro Poroshenko, Ukraine signed the political part of the "Association Agreement" in Brussels, in March. The signatories were Ukraine, the Council of the European Union, the European Commission and the heads of 28 states (including the Republic of Poland). The economic part of the above-mentioned agreement was signed in June. Poland and Ukraine signed a number of international multilateral agreements during 2014, including "Amendments and Supplements to the Agreement on International Rail Freight Services (IRF)"; "Agreement between the Government of the Republic of Lithuania, the Government of the Republic of Poland and the Cabinet of Ministers of Ukraine on the Creation of a Joint Military Unit"; "Protocol on Sustainable Transport to the Framework Convention on the Protection and Sustainable Development of the Carpathians", the issue on the cross-border cooperation in the interdepartmental protocols and agreements was updated. According to the Head of the Polish Foreign Ministry at that time, such kind of activity by the Polish Republic reflected the updated Giedroyc's postulates and modernized by the "Jagiellonian" and "Piast" doctrines (Mieliekiestsev, & But, 2020, pp. 107–108).

The Russian annexation of the Crimean peninsula and the aggression in Eastern Ukraine highlighted the security issue on the European continent and the hybrid dimension of the modern military conflicts (Bilichak, & Huz, 2024, p.164). The Polish Minister of Foreign Affairs condemned the annexation of the Crimean peninsula and emphasized when he delivered a speech before the Sejm and stated that the events in Ukraine demonstrated problematic areas in the EU policy, since the European community has only a limited ability to respond to crisis situations in May of 2014. At the same time, R. Sikorski emphasized that the basis of the Polish Eastern policy is the existence of independent Ukraine, Belarus and the Baltic countries, which are in good terms with Poland. At the same time, Poland carried on to support Ukraine consistently, despite the personnel changes (the government was headed by Ewa Kopacz), in particular, after the signing of the political and economic agreement on cooperation between Ukraine and the EU, on November 28 of 2014, the Polish Sejm ratified the Association Agreement between Ukraine and the EU, and on December 4, the Senate ratified it (Artymyshyn, & Kostiuk, 2020a, p. 65).

Taking into consideration the threats in Central and Eastern Europe and the need for regional cooperation, Lithuania, the Republic of Poland and Ukraine signed an agreement in Lublin on the establishment of the Lithuanian-Polish-Ukrainian Brigade in September of 2014 (Stănică, 2022, p. 119). According to the Technical Agreement signed on July 24 of 2015 in Lviv, the Heads of the Defense Departments of Ukraine, Lithuania and Poland agreed on the key mission of the brigade "the brigade must be ready to participate in the

international operations in accordance with the provisions and principles of the international law” (Grand Hetman Kostiantyn Ostrogski Lithuanian-Polish-Ukrainian Brigade. Mission, 2018), the brigade’s functioning aspects (Technical Agreement on the Functioning of the Joint Military Unit “Litpolukrbrig”, 2015). There were also developed joint information and media support systems later on (Poronyuk, & Gapeyeva, 2023, p. 231).

There was a drastic need to revise Poland’s foreign policy orientation, the so-called “Komorowski doctrine” in the context of Russia’s hybrid war against Ukraine, hence, a new “National Security Strategy of the Republic of Poland” was approved after the September NATO summit in November of 2014. It emphasized that due to the conflict and crisis in Ukraine, Russia is the main military threat to the Republic of Poland. The above-mentioned postulate became innovative, because such a status of the Russian Federation regarding Poland was not indicated anywhere (Strategia Bezpieczeństwa, 2014). The speech, delivered by the President of the Republic of Poland in the session hall of the Verkhovna Rada on April 9 of 2015, was symbolic and important step in supporting interstate cooperation for the first time in history. B. Komorowski highlighted the following while taking the floor: “Poland is doing and will do everything to ensure that other countries of the free West lend a hand to Ukraine. Poland’s hand is not a matter of political circumstances, but our understanding of historical processes that contribute to the vision of Ukraine as an important partner and neighbour” (Istorychnyi vystup, 2015).

A new stage in the Polish-Ukrainian relations began after the election of Andrzej Duda as President of the Republic of Poland in 2015. The newly elected president expressed dissatisfaction with the format of the Ukrainian-Russian peace talks, noting that only France and Germany were mainly involved in them, and not all EU countries, and therefore proposed a new format for the negotiation process in which Ukraine’s neighbours would be participants. These statements were first voiced during a telephone conversation between A. Duda and P. Poroshenko on August 15, 2015 (Duda zaproponuvav, 2015). The leadership of the Republic of Poland broadcast statements that from now on the state should switch to the doctrine of J. Piłsudski and Je. Giedroyc, and most importantly, the “project of Intermarium – Poland at the head of the states of Eastern Europe” should be restored. At the same time, according to Giedroyc’s ideas, the sovereignty of the eastern neighbouring states should be respected (Mieliekiestsev, & But, 2020, p. 109).

It should be noted that the concept of the Intermarium itself is not an innovative approach in the foreign policy concepts of the Republic of Poland and Ukraine. This idea was also developed by the Ukrainian figures at the beginning of the 20th century (Mykola Mikhnovsky, Stepan Rudnytsky, Mykhailo Hrushevsky, Yuriy Lypa, defending the idea of the importance of the alliance between the Polish and Ukrainian states). In the 1990s, Viacheslav Chornovil was interested in this idea among the Ukrainian politicians, and there were published diverse studies in Poland, which provided a geopolitical overview of the outlined region, put forward various options for a possible alliance, considered its further prospects in the context of relations with Western Europe, Russia, Scandinavia, etc. (Todorov, & Todorov, 2016, p. 28). During the period of the 1990s and 2000s, the format of a possible alliance was discussed at the highest level among Ukraine, Poland and Lithuania, but there was not created any active institution in order to implement the declared postulates. The above-mentioned issue was again brought up in expert circles, in particular in the circles of the possible member states of Poland, the Czech Republic, Slovakia, Hungary, Lithuania, Latvia, Estonia, Romania and Ukraine after the Russian aggression in Ukraine in 2014 and the statements made by A. Duda

in 2015. The most active position regarding the implementation of the Intermarium concept was taken by Poland, which at the same time also supported the European integration course of Ukraine (Todorov, & Todorov, 2016, pp. 30–31). At the same time, such a pro-Ukrainian policy, as a scholar Kateryna Zarembo noted, “became an electorally unpopular position in Poland” (Zarembo, 2019).

The idea of the interwar project “Intermarium” was also updated, which was somewhat changed in the context of the new geopolitics into the concept of “Trymoria”. It should be noted that these concepts were used actively both in the scientific and expert spheres. American researchers Marlene Laruelle and Ellen Rivera from the Institute for the European, Russian and Eurasian Studies at George Washington University, who analyzed the role of the concept of “Mizhmoria” in the politics of the European Union and the United States, described it as an “imaginary geographical concept (subject)” (Laruelle, & Rivera, 2019, pp. 3–4). The scholars M. Laruelle and E. Rivera noted that the new Polish President A. Duda from 2015 became a promoter of increased regional cooperation in Central and Eastern Europe, but this idea had primarily an economic basis, not a political or military one: “Initially, the project grew out of the debates sparked by a report published jointly by the Atlantic Council and the EU energy lobby group Central Europe Energy Partners (CEEP) in order to promote the interests of large Central European companies in the EU... Pawel Olechnowicz, CEO of the Polish oil and gas giant Grupa Lotos, called for the accelerated construction of the North-South energy, transport and communications corridor stretching from the Baltic Sea to the Adriatic and Black Seas” (Laruelle, & Rivera, 2019, pp. 18–19).

According to Ukrainian historians Oleh Kostyuk and Pavlo Artymyshyn the above-mentioned concept “in its content it became a return to the Jagiellonian idea, taking into account the lack of intentions to create a Central European association independent of the EU and NATO. The inaugural summit of the “Three Seas Initiative” (the Baltic, Adriatic, Black) was held in Dubrovnik, Croatia in August of 2016, 12 countries of Central and Eastern Europe took part in it (Austria, Bulgaria, Croatia, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, Slovenia)” (Artymyshyn, & Kostyuk, 2020a, pp. 66–67).

Geopolitical vectors influence the historical narratives articulated by the state, in particular those relating to the common Polish-Ukrainian past (Syrnyk, 2022, p. 161). Since 2015, especially after the victory in the Parliamentary elections of Jarosław Kaczyński, the Polish state decided to abandon a single-vector pro-European foreign policy, since then more and more focus was on the eastern direction, and the political course became more internally “state-centric”. It could be also evidenced by the decisions made by the Polish authorities on the “controversial” issues of common Polish-Ukrainian history. In the summer of 2016, first the Senate, and then the Sejm of Poland voted to adopt a resolution “On establishing July 11 as the Day of Remembrance of the Poles, Victims of the Genocide Committed by the OUN-UPA”. These steps by the Polish authorities, despite the readiness of the Ukrainian side for dialogue, a number of appeals from both politicians and church hierarchs, affected negatively the possibility of reconciliation between the two states on sensitive historical topics. The result of further aggravation of the Polish-Ukrainian relations in the humanitarian sphere, according to the definition of the Ukrainian historian Liudmyla Strilchuk, there were the so-called “wars on graves” – desecration of the Ukrainian memorial sites in Poland (Artymyshyn, & Kostyuk, 2020a, p.67; Strilchuk, 2018, pp. 179–180).

On December 2 of 2016, the General Agreement between the Cabinet of Ministers of Ukraine and the Government of the Republic of Poland on cooperation in the field of defense

was signed. This agreement provided for 24 points on various areas of cooperation in the field of military weapons and technologies (Heneralna uhoda, 2016). At the same time, according to a scholar Oleksiy Polegkyi, “The Foreign Policy Strategy of the Republic of Poland for 2017 – 2021 is aimed at strengthening the infrastructure connection between the Baltic and Central European countries, including those located between the Baltic, Adriatic and Black Seas, and continuing the Polish-Lithuanian-Ukrainian military cooperation as part of a joint brigade”. In addition, identifying the most serious threat, the policy of the Russian Federation provides for the need to strengthen the NATO and the European Union, “develop cooperation in bilateral, regional and global formats to strengthen Poland’s position”. The NATO Warsaw Summit became the final outcome of the above-mentioned statements in July of 2016, where it was agreed to strengthen the military presence of the NATO members in Central and Eastern Europe (Polegkyi, 2021, pp. 39–40).

In order to respond to modern challenges effectively, the “LitPolUkrBrig” began the first joint exercise “Brave Band” as part of the brigade command in Lublin on February 1, 2016. In June of 2016, the first field training took place at the “Nowa Demba” training ground “under the scenario of stabilization operations within the framework of the NATO exercise “Anaconda – 2016””. It should be noted that it was attended by servicemen from 23 countries of the world, including the Ukrainians as part of the Polish battalion. No less important was the completion of the NATO certification exercise “Common Challenge – 2016”. According to the results, “the brigade confirmed its readiness to carry out peacekeeping missions in accordance with the NATO standards, and the command of the “LitPolUkrbryg” was recognized as a fully combat-ready unit, which was supported by the signing of the corresponding Certificate” (Turianytsia, 2018, p. 433).

The period of years 2017 – 2018 were tense for the Polish-Ukrainian relations, as misunderstandings arose in the economic sphere and humanitarian policy sporadically (Wroński, 2017). At the same time, in the “Polish Foreign Policy Strategy for 2017 – 2021” it is noted that “The security environment of the Republic of Poland has seriously deteriorated as a result of the Crimea annexation by Russia and the conflict it provoked in eastern Ukraine. The war, aggression against neighbouring sovereign states and violations of territorial integrity have returned to the European political landscape on such a scale and so openly for the first time since World War II. The entire European security architecture, based on OSCE principles, has been called into question” (Strategia Polskiej Polityki Zagranicznej, 2017). Therefore, in order to create a secure environment, Poland must simultaneously act at three levels: allied, i.e. strengthen its authority in NATO and EU structures, maintain relations with the USA; regional – strengthen cooperation with the countries of the region, in particular the Visegrád Group, Romania and the Baltic and Nordic countries, and strengthen the Eastern dimension of policy; national – strengthen its own defense capabilities (Strategia Polskiej Polityki Zagranicznej, 2017). Therefore, important tasks are to achieve NATO-Russia communication, which should be based “on the principle of “3xD” (defense, deterrence, dialogue). In the context of relations with Ukraine – “strengthening cooperation between the defense industries of Poland and Ukraine” (Strategia Polskiej Polityki Zagranicznej, 2017).

In May of 2020, Poland adopted the “Polish National Security Strategy”, which determined that the priority for the state is the formation of an international order based on international law and solidarity, which would also guarantee a secure development of Poland. At the same time, in the document it is noted that the illegal annexation of the Crimea and actions in the eastern regions of Ukraine are a direct violation of international law. Therefore, given the

threat from the Russian Federation and the situation in the region, the experts-authors of the Strategy believed that the most important task for Poland was to represent itself as strongly as possible in the EU and NATO, and to further develop cooperation with its neighbours (National Security Strategy of The Republic of Poland, 2020).

A new important international initiative aimed at strengthening stability, self-defense and security in the Central-Eastern region between Poland, Lithuania and Ukraine is the project launched on July 28, 2020 – “The Lublin Triangle” (in Lithuanian – Liublino trikampis, in Polish – Trójkąt Lubelski). Its main goal is the integration of Ukraine into NATO and the European Union, and strengthening resistance to the Russian aggression. A Joint Declaration was signed among the countries, which emphasized the common historical ties among the signatory countries, and the foreign ministers committed to holding joint meetings and strengthening trilateral cooperation. In the context of Russian aggression, it is important to establish joint work, especially the Lithuanian-Polish-Ukrainian brigade (“LitPolUkrBrig”); as well as coordination of work both at the level of trilateral cooperation and within international organizations (NATO, European Union, UN, Council of Europe, OSCE) (Spilna deklaratsiia, 2020). The importance of “the Lublin Triangle” format is also evidenced by the fact that it is approved in the Strategy of Foreign Policy Activities of Ukraine. As international relations expert Serhiy Herasymchuk noted, “The Lublin Triangle”, together with the Associated Trio, Quadriga, and the Crimean Platform, these new formats are an expression of Ukraine’s new proactive foreign policy and are aimed at creating a belt of security and prosperity for Ukraine and the region between the Baltic and Black Seas” (Herasymchuk, 2022).

In July of 2021, during a regular meeting in Vilnius, the member states of “The Lublin Triangle”, Ukraine, Lithuania and Poland signed a joint agreement on further cooperation and declaration on European heritage and values, and mainly agreed on a plan of joint actions to counter disinformation (mainly Russian) (Nechaieva-Yuriichuk, 2022, p. 152).

Taking into consideration the priorities of this intergovernmental association in the field of countering the expansionist policy of the Russian Federation, military and defense interaction using the potential of NATO and the EU, its participants within this organization, as well as individually, provide a multi-vector support in the political and military spheres. In particular, in December of 2021, the presidents of Ukraine (Volodymyr Zelensky), the Republic of Poland (Andrzej Duda), and the Republic of Lithuania (Gitanas Nausėda) signed a joint declaration, which confirmed support for Ukraine’s membership in NATO and the European Union (Riabchun, 2021). At the same time, during a joint press conference, the Polish president noted the importance of Ukraine’s security, which he described as a “fundamental issue”, because it is necessary not only to prevent an attack on Ukraine, but also “first of all, everything must be done to prevent such an attack” (Zhelikhovskiy, 2021).

On February 23, 2022, in Kyiv, the Presidents of Ukraine, Poland, and Lithuania signed a joint statement supporting Ukraine’s accession to the European Union, in particular, the heads of European states expressed support for granting Ukraine the status of a candidate country for accession. Also, the arrival of European leaders, as A. Duda noted, is essentially “an expression of support in the face of the Russian threat” (Zelensky, Duda, and Nausėda signed a statement, 2022). The President of Ukraine stated that during the meeting, the consequences of Russia’s actions were discussed, efforts were coordinated with the aim of “countering aggression from the Russian Federation”. Volodymyr Zelensky noted that Poland and Lithuania also provided specific support to Ukraine, in particular, “protective

helmets, ammunition, and Stinger portable anti-aircraft missile systems were transferred to our security and defense forces” (Zelensky, 2022).

On March 14, 2022, the states participating in the Lublin Triangle condemned Russia’s military invasion of Ukraine. The joint declaration also formulated a demand for the Russian leadership to “immediately cease all its military actions and unconditionally withdraw all its forces and military equipment from the entire territory of Ukraine within its internationally recognized borders” (Nechaieva-Yuriichuk, 2022, p. 153). In June of 2022, the President of Ukraine took part in the summit of the “Three Seas” states for the first time. Ukraine acquired the status of a “participating partner of this regional alliance” (Knysh, 2022).

The Republic of Poland, on the eve of a full-scale invasion, contributed to increasing Ukraine’s defense capabilities, in particular, at the end of January of 2022, the Head of the National Security Bureau (BBN) of Poland, Paweł Soloch, announced the transfer of defensive weapons (Польща передасть Україні оборонне озброєння, 2022). A political scholar and international relations researcher Ireneusz Topolski noted that after February 24, 2022, Poland became one of the “first countries to provide military assistance in a critical situation, gradually expanding its scope to heavy weapons” (Topolski, 2024, p. 131).

A political scholar Agnieszka Biencyzk-Missala argued that in 2022 the main slogan of Polish foreign policy was the motto “to help Ukraine by all possible means”, as the Republic of Poland significantly intensified international attention and assistance to Ukraine, at the same time, in 2023 among the priorities of Poland’s foreign policy were “the search of military, financial and humanitarian assistance for Ukraine, the formation of an international policy of sanctions against Russia, and taking measures to strengthen the defense potential of Poland and the entire eastern flank of NATO”. At the same time, the researcher emphasized that the Republic of Poland provided significant logistical support, as military equipment and humanitarian aid were transported through its territory. According to A. Biencyzk-Missala, during the period from “February 24, 2022 to January 10, 2023, more than 9.5 million refugees crossed the border with Poland, of which more than 1.5 million were registered” (Biencyzk-Missala, 2023, p. 341).

From the end of January and the first months of the war until mid-2022, the Polish military support included: “1) bullets and ammunition – initially several tens of thousands of pieces; 2. individual equipment and medical aid; 3. light weapons; 4. small arms; 5. reconnaissance drones – FlyEye” (Topolski, 2024, p. 137). According to Ireneusz Topolski, in April of 2022, the volume of Polish military aid to Ukraine amounted to about 1.6 billion euros. In the following months, this aid increased and in May of 2022 amounted to more than 1.8 billion euros (7 billion zlotys). According to the Kiel Institute for the World Economy (IfW), in mid-2022, Poland was the second largest military aid giver after the United States and by January 15, 2023, it had provided assistance worth 2.43 billion euros, including heavy weapons worth approximately 1.2 billion euros (Topolski, 2024, p. 141).

Conclusions and Prospects for Further Research. In 1990 – 2000 Poland’s systematic support for Ukraine and its European development vector is part of a broader geopolitical vision of Ukraine as one of the countries (along with Lithuania and Belarus) called upon to resist Russian imperialism. In 2004 Poland’s accession to the EU was a turning point for the Polish-Ukrainian relations, as the Polish ruling circles strongly promoted the rapprochement of Ukraine and the EU. Intensification of the Polish-Ukrainian relations took place at the turn of 2013 – 2014 in the context of Euromaidan, the Revolution of Dignity, and the Russian armed aggression in 2014. During the period of 2014 – 2022, Poland provided significant support

to Ukraine at the bilateral and international levels. The establishment of good-neighbourly relations and military political assistance to Ukraine was implemented by Poland through the prism of implementing the “Intermarium” concept, and later the “Three Seas Initiative”, which reflect a broader geopolitical doctrine that takes into account the historical past and the desire to become one of the dominant powers in Central and Eastern Europe. Since 2015, after the victory of Andrzej Duda in the presidential elections, the parliamentary elections of Jarosław Kaczyński, and even more intensively since 2017, Poland has been abandoning a unilateral policy oriented towards the West. Instead, Poland is implementing a policy of integration of EU member states located between the Adriatic, Baltic, and Black Seas. That is, the interwar project “Intermarium” in the context of the new European geopolitical configuration is transforming into the “Three Seas Initiative” – “Three Seas”. It is worth noting that the security sphere remained a priority in the Polish policy, as evidenced by a number of initiatives, including the creation of the Lithuanian-Polish-Ukrainian Brigade (“LitPolUkrBrig”); joint military training, “the Lublin Triangle” project. A set of measures that contribute to strengthening military cooperation between states, mastering advanced technologies and training standards of the Armed Forces of Ukraine is extremely important in the context of the full-scale invasion of Ukraine by the Russian Federation in February of 2022 and the threat of further aggression in the region. Therefore, Poland increased its assistance to Ukraine in the military, financial, and humanitarian spheres significantly. From mid-2022 to early 2023, it became the second country after the United States in terms of the scale of military assistance to Ukraine.

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SCHOOL HISTORY EDUCATION IN THE TEMPORARY OCCUPIED TERRITORIES OF UKRAINE (2014 – 2022): IDEAS OF “RUSSIAN WORLD” AGAINST THE CONCEPT OF THE UKRAINIAN STATE

Abstract. *The purpose of the article is to analyze the course “History of Motherland” at schools on temporary occupied territories of Donetsk region. On the basis of the overview of syllabus contents in general and the stages of Ukrainian state-building in particular, the authors have highlighted a manipulative nature of syllabus and identified hybrid threats as consequences of its applying. Research Methodology.* The authors make conclusions considering the fact that school education has a huge impact on shaping the worldview and mounding opinions of a person. The study is based on civilizational and anthropocentric approaches, the method of content analysis has been applied. **Scientific Novelty.** An attempt to analyze the content and purpose of historical education at secondary schools on the temporarily occupied territories of Donetsk region has been made in historiography of Ukraine for the first time. **Conclusions.** Teaching History in the occupied territories is an important

component of the Russian propaganda aiming at forming the Russian identity among young people. By twisting past events students are convinced that they are part of “Russky mir” (Russian world). Primarily, it refers to elimination of the events, connected with Ukrainian state formation, as well as the lack of information about national rebirth and national identity which is supposed to be the basis of the Ukrainian modern nation formation. Moreover, the Ukrainian past of Donetsk region is either hidden or distorted in favour of Putin’s ideology which creates a complete rejection of their own history and Ukrainian identity among young people. As a result, anti-Ukrainian nature of the educational course aims at eliminating their own historical memory among students and impose a new made-up one which is beneficial to Russia.

Taking into consideration the above mentioned, today one of the main tasks of the Ukrainian historians is to find the ways to combat Russian information propaganda as school History course in the temporarily occupied territories can definitely be classified as information-propaganda tool of Russia’s hybrid warfare against Ukraine.

Key words: school history education, temporarily occupied territories, hybrid threats, “Russky mir”, historical instrumentalization, civilizational approach.

ШКІЛЬНА ІСТОРИЧНА ОСВІТА НА ТИМЧАСОВО ОКУПОВАНИХ ТЕРИТОРІЯХ УКРАЇНИ (2014 – 2022): ІДЕЇ “РУССКОГО МИРА” ПРОТИ КОНЦЕПЦІЇ УКРАЇНСЬКОЇ ДЕРЖАВНОСТІ

Анотація. Метою статті є аналіз курсу “история отечества” для шкіл тимчасово окупованої території Донецької області. На основі розгляду змістового наповнення програм, а саме крізь призму етапів українського державотворення, автори показали їхній маніпулятивний характер та ідентифікували гібридні загрози як наслідок їх використання. **Методологія дослідження.** Автори зважали на положення, що на формування світогляду і переконань людини значно впливає шкільна освіта. За основу дослідження взято цивілізаційний та антропоцентричний підходи, застосовано метод контент-аналізу. **Наукова новизна.** Уперше у вітчизняній історіографії проаналізовано зміст та мету використання програми з історії у закладах середньої освіти на території тимчасово окупованої Донецької області. **Висновки.** Викладання історії на окупованих територіях є важливим складником російської пропаганди, завдання якої – формування в молоді російської ідентичності. За допомогою перекручування подій минулого школярам насаджується думка, що вони є частиною “русского мира”. Насамперед це виявляється у витісненні подій, пов’язаних з українським державотворенням, а також відсутністю інформації про національне відродження та національну ідею, що є основою формування української модерної нації. Водночас українське минуле Донеччини чи приховано, чи викривлено на користь російської путінської ідеології, що формує в молоді абсолютне несприйняття власної історії та свого українського “Я”. Отже, антиукраїнський характер програми покликаний знищити в молодого покоління власну історичну пам’ять та нав’язати вигадану нову, вигідну для Росії.

Зважаючи на це, в умовах сучасності одним із головних завдань українських істориків є винайдення шляхів протидії російській інформаційній пропаганді, адже курс шкільної історії на тимчасово окупованих територіях однозначно можна класифікувати як інформаційно-пропагандистський інструмент гібридної війни Росії проти України.

Ключові слова: шкільна історична освіта, тимчасово окуповані території, гібридні загрози, “русский мир”, інструменталізація історії, цивілізаційний підхід.

Problem Statement. The concept of “Russky mir” (Russian world), which emerged at the beginning of the 2000s as a philosophical and historical basis for defining the past, present, and most importantly, future existence of the Russian Federation, quickly turned into a political technology, the purpose of which was “to promote Russian great-power chauvinism and interfere in the internal affairs of post-Soviet countries” (Holovko, 2021). The effects of this political technology were among the first to be felt by residents of the temporarily

occupied Donetsk region in 2014. Among numerous manifestations of the “Russky mir” the focus of Putin’s ideologists is on secondary education institutions, because it is there that the future of the “young republic” is being educated.

In order to shape consciousness of a younger generation in the formulas of the “Russky mir”, the occupation authorities, with the support of Russia, exercise a strict control over school History subjects, which have become a significant tool for the ideological education of the youth of the so-called “dnr”. Currently, a whole generation of schoolchildren is growing up under the rule of “Russky mir”. It is necessary to determine the ways of “returning” the mind, consciousness, identity, and historical memory of young people after the de-occupation of Ukrainian territories. Our knowledge of how children were taught and what they were taught will become fundamental. The above mentioned explains the choice of the publication topic – the study of the school course syllabus “History of Motherland”, according to which, until recently, History has been taught in the temporarily occupied territories of Donetsk region.

The significance of this issue found its implementation in the project “Stop Instrumentalization of History” of the programme “Learn and Distinguish: Info-Media Literacy”, implemented by the International Research and Exchanges Council (IREX), whose participants were teachers and students of Donbas State Pedagogical University in 2020 – 2022.

Review of Sources and Recent Research. Nowadays in Ukraine, historical events are covered using modern academic knowledge and approaches that place domestic history in the context of European history (Dvorkin, Telukha, & Kharchenko, 2021, p. 367). The Soviet narrative is finally receding into the past (the myth of the “Great Patriotic War” has been destroyed, the terms such as “Soviet occupation”, “deportation”, etc. have been introduced into History course), and domestic researchers try to bring Ukrainian historical education closer to the level of developed democratic states.

Instead, the historical policy of the Russian Federation rejects the values of democracy (primarily democratic freedoms), the European civilizational choice. Russia actively manipulates its own (and Ukrainian) history in order to create a historical myth and form the concept of “Russky mir”, which combines the imperial and Soviet narratives.

Domestic researchers study such “manipulations” actively, in particular in the aspects of: the Russian propaganda, which has become an important element of preparation for a full-scale invasion of Ukraine (Ilnytskyi, Starka, & Haliv, 2022); the image construction of the enemy and ideological legitimization of aggression wars in their historiography (Kalakura, 2022); a clear and vivid anti-Ukrainian and repressive nature of historical policy in Russia (Udod, 2022); manipulative strategy of distorting the past as a component of Russia’s anti-Ukrainian policy in Eastern Ukraine (Lozovyi, 2018); militarization of educational process in the temporarily occupied territories (Demianenko, & Demianenko, 2021) etc. The work of Mykola Haliv and Vasyl Ilnytsky is of theoretical importance for our research (Haliv, & Ilnytskyi, 2023).

There should be noted the studies by Ukrainian historian Larysa Yakubova “Ontology of Racism: Ukraine as Russia’s Alter Ego” (Yakubova, 2022), “Racism: Beast from Abyss” (Yakubova, 2023). The researcher focused on “racism” as “the highest stage of “Russky mir”” (Yakubova, 2023, p. 24) and answered important questions of today: why Putin’s Russia became totalitarian; what is the essence of racism and how it threatens both Ukraine and the world.

The scholars’ studies on school History education in Russia are worth noting, because the academic discipline “History” in the eyes of the aggressor state is an important tool

for ideological education of youth. Thus, Vitaliy Yaremchuk (Yaremchuk, 2023) stated that official Russian historical policy became the basis of Russian school History course (Yaremchuk, 2023, p. 180). In Russia schoolchildren are taught that Ukraine is not a “different,” “foreign” state, but a component of the Russian narrative, i.e. “their” history. Topics related to Ukrainian history in school textbooks are “subordinated to the logic of the state-imperial narrative of Russian history”. The author aptly noted that in Russian historical education there is an absolute “desubjectivization” of the history of Ukraine (Yaremchuk, 2023, pp. 176, 179, 183).

Svitlana Baturina analyzed the content of Russian textbooks for the period from 2009 to 2015 and concluded that the history of Ukraine was not singled out as an independent category and was considered in the context of Russian history (Baturina, 2016, p. 477).

Yaroslav Motenko and Yevhenia Shyshkina study the education system in the territories temporarily not controlled by Ukraine as a means of political propaganda by the Russian Federation (Motenko, & Shyshkina, 2021). The authors’ research is based on the study of educational literature of local history for the course “History of Motherland”. The authors stated that the publications they analyzed are a tool of informational and psychological influence and concluded that “there is an urgent need to develop methods for determining potential risks contained in the course “History of Motherland” as a means of representing the past” (Motenko, & Shyshkina, 2021, pp. 107, 108, 109, 110).

The purpose of the article is to consider the syllabuses of “History of Motherland” course at schools in the temporarily occupied territory of Donetsk region as a means of instrumentalizing history and historical memory in the context of the policy of Putin’s Russia. To this end, we will trace the process of “desubjectivization” of Ukrainian history through the displacement of Ukrainian statehood concept and transition from a Ukrainian-centric discourse to a Russian-centric one in school History course in the temporarily occupied territories.

The research is based on civilizational and anthropocentric approaches, and the content analysis method has been applied.

Results of the Research. The school course syllabus “History of Motherland” is taken as a historical source (Programma: 5–9 klassy, 2019; Programma: 10–11 klassy”, 2019) for schools in the so-called “dnr”. The syllabus developers represent secondary schools, methodological institutions, and educational governing bodies. The scientific and methodological editing of the syllabuses was carried out by the rector and vice-rector of Donetsk republican institute of additional pedagogical education, and they were reviewed by a representative of a higher school (candidate of historical sciences, head of the department of Donetsk University) and a secondary school (a teacher-methodologist). The syllabuses were compiled on the basis of the “State Educational Standard of Basic General Education of the Donetsk people’s republic” and put into effect by order of the ministry of education and science of the so-called “dnr”.

Checking documents on the anti-plagiarism system showed that the syllabus is a compilation of various works. Thus, an analysis of the explanatory note of the syllabus “History of Motherland” for Grades 10–11 showed that the text uniqueness was 13.08%. Sites that contain original information are educational sites of schools in the Republic of Tatarstan and other schools in Russia and (!?) syllabuses of the Ministry of Education and Science of Ukraine.

The syllabus “History of Motherland” was republished several times with additions and changes. To determine the process of transition from a Ukrainian-centric to Russian-centric

discourse, a comparative analysis of the syllabus in the 2015, 2017, and 2019 editions has been conducted. The choice of years is due to access to these documents on the Internet.

Characterizing the editions of different years, we note changes in the final list of recommended literature, which indicate the displacement of textbooks from the Ukrainian publishing houses. Thus, in the syllabuses of 2015 and 2017, six out of 58 positions belong to publishing houses of Kyiv and Zaporizhzhia. These were Ukrainian textbooks published in Russian and dedicated to various periods of world history. In 2019, the list of literature contains 44 items, from which previous works by Ukrainian publishers were completely removed. Instead, six studies on local history published in Donetsk from 1998 to 2014 were added. We believe that the reason for rejecting a number of studies was precisely the fact that they were published on the territory of Ukraine (with the exception of the temporarily occupied territory of Donetsk region). A comparison of the texts also shows that the 2019 edition contains significantly more inconsistencies, violations in structure and logic of presentation than the previous ones.

According to M. Hrushevsky's concept of Ukrainian statehood, its first form and stage was the Kyivan state. Let's trace how the syllabus for Grade 7 presents one of the most important topics of medieval history. The history of the Kyivan state is presented in the 2019 syllabus in the spirit of Russian imperial and Soviet historiography. This is indicated by the prevalence of the concept of "Old Russian state" and its derivatives. Starting from the period of the 15th – 16th centuries, the concept of "Old Russian State" is replaced by "Russian".

The use of such a name for the state of Rus' is undoubtedly a tool of information warfare and russification. The concept of "Rus'" is being replaced by "Russian", i. e. the identification of medieval state of Rus' with modern Russia as its direct successor. An unconscious, uncritical belief is embedded in the minds of students that the lands of Ukraine should be part of modern Russia, which makes the aggression by the eastern neighbour justified and legitimate in their eyes.

Let us analyze the terminology associated with the era of the Kyivan state in the context of the issue of abandoning the Ukrainian-centric discourse during the period of 2015 – 2019. The scope of analysis included topics related to the formation, flourishing, and fragmentation of Rus'. We identified three terminological groups: 1) terms that are not typical of modern Russian historiography and are used by Ukrainian scholars ("Kyivan Rus'", "Kyivan state", "Kyivan princes"); 2) the terms that were used by both Ukrainian and Russian historiography before the beginning of the Russian aggression in 2014, today only the latter is used, with the exception of the name "Rus'" ("Rus'", "Ancient Rus'", "Ancient Rus' state", "Ancient Rus' princes", etc.); 3) the terms of purely Russian historiography, which modernize the terms "Rus'", "Russky" to identify them with the modern concepts "Russia", "russian" ("russian state", "russian culture").

In the 2015 syllabus, in the topics of the Kyivan state era, more than a third of the terms (13 or 38%) used in the content of the topics belong to Ukrainian historiography. Terms that were used equally by historians in Ukraine and Russia until 2014 make up half (17 or 50%) (Programma: 7 klass, 2015, pp. 18–20). That is, from 38% to 88% of the content of the relevant topics of the 2015 syllabus is based on Ukrainian predecessor texts.

In the 2017 syllabus, the terms referring to the Kyivan state that refer to Kyiv were removed (replaced). There is no doubt that this was done purposefully so that students would not have a logical chain in the components "state with a centre in Kyiv in the Middle Ages" – "a modern state with a centre in Kyiv – Ukraine", Kyivan Rus' as the beginnings

of Ukrainian statehood. The term “Kyivan Rus’” in 2017 and 2019 was used once in the same sentence, which defines the requirements for a student’s knowledge: “...shows ... the territory of Kyivan Rus’ during the reign of Volodymyr Sviatoslavych, Yaroslav the Wise, Volodymyr Monomakh” (Programma: 7 klass, 2017, p. 15; Programma: 5–9 klassy, 2019, p. 30). The above mentioned allows us to conclude that this Ukrainian term was not removed by accident, it was not noticed.

The cleansing of Ukrainian historical science from the Russian imperial terminology to refer to Rus’ (“Ancient Rus’ State”), prompted by the events of 2014, exacerbates a mental gap between representatives of the generation of Ukrainians who receive school education in the temporarily occupied territory and Ukrainian youth in the territory controlled by Ukraine.

As for the tradition in Russian historiography of using the term “Russian” to denote “Rus’”, in Grade 7 of the 2019 edition it almost dissolves between the concepts of “Rus’” and “Ancient Rus’ State”. However, in the last two topics, the term “Russian” and its derivatives are used 29 times, compared to 13 times for the term “Rus’” (Programma: 5–9 klassy, 2019, pp. 32–25). This distortion of historical processes of the Middle Ages is designed to form an identification of the medieval state of Rus’ with modern Russia, while appealing to patriotic feelings, especially when used in an ideological context: “The idea of the unity of the Russian lands”, “The struggle of the Russian people against Horde rule” (Programma: 5–9 klassy, 2019, pp. 31, 32).

The Term “Ukraine”. Continuing the topic of displacement of terms denoting Ukrainian statehood in the past and present, let us analyze the contexts of the absence/presence of the term “Ukraine” in the syllabus, in particular for Grade 8. It should be noted that in Grade 8 the name “Ukraine” is almost never used (although this polytonym also existed in modern times), and the historical names “Hetmanate” and “Malorosiya” are used. At the same time, the name “Ukraine” suddenly appears in the material from the middle of the 17th century in a sentence regarding the Pereyaslav Treaty of 1654: “The Entry of Ukraine into Russia” (Programma: 5–9 klassy, 2019, p. 44). If we follow the logic of the syllabus presentation, the use of historical names of the states “Hetmanate” and “Moscow Kingdom” is expected. This makes it possible to conclude that avoidance of the polytonym “Ukraine” is deliberate. At the same time, in our opinion, the appearance of the very formulation “Ukraine’s accession to Russia” is not accidental. It should form the idea in students the confidence that Ukraine became a part of the Russian state back in the 17th century, and therefore, Russia’s modern encroachments on the sovereignty of the Ukrainian state are natural.

In Topic 4, Grade 8 syllabus, the National Liberation War (or, according to another concept, the revolution) led by B. Khmelnytsky is presented in the spirit of modern Russian historiography as an uprising (Programma: 5–9 klassy, 2019, p. 44), which reduces the significance and scale of key events in the life of the Ukrainian people in the mid-17th century. This topic, which was significant for the formation of Ukrainian statehood, was even interpreted as a war (“national liberation anti-feudal”) in the Soviet historiography.

Let’s turn to the comparison of the content of the “History of Motherland” syllabus for Grade 8 of the 2017 and 2019 editions. The above-mentioned sentence of 2019 “Ukraine’s entry into Russia” sounded somewhat different in 2017: “... entry into Russia of Hetmanship (Left Bank Ukraine)”, “The Entry of Left Bank Ukraine into Russia” (Programma: 8 klass, 2017, p. 16). Thus, despite the inconsistency of using the modernized name of Russia alongside the historical name of Ukraine (Hetmanate), at least from the 2017 edition it became clear that it was about the inclusion of only part of the territory of modern Ukraine – Left Bank.

Also noteworthy are the changes in students' academic achievements in the context of the topic: the 2017 edition "(a student analyzes – *Author*) ... the significance of the Hetmanate becoming part of Russia" was replaced by the 2019 edition "(a student expresses an opinion – *Author*) ... on the nature and initiatives of Ukraine becoming part of Russia" (Programma: 8 klass, 2017, p. 17; Programma: 5–9 klassy, 2019, p. 45). That is, the 2017 edition focuses on the significance of the event (and therefore, primarily, for Russia), while the 2019 edition focuses on the alleged desire of the Ukrainians to become part of Russia (which satisfies Russia).

In the context of the targeted displacement of terms that refer to Ukraine/Ukrainian, it is telling to count the number of times these names are used in the syllabus, the ratio with the use of names "Russia"/"Russian". We obtained the following data: the lexeme "Ukraine" and its derivatives occur in Grade 8 4 times (twice – as "Ukrainian fortified line"), in Grade 9 – only once (the concept of "Ukrainian elite"); the lexeme "Malorosiya"/"Malorosiysky" occurs in Grade 8 4 times, in Grade 9 – twice, while the lexemes "Russia"/"Russian" are used in Grade 8 114 times, in Grade 9 – 99 times (twice – in the lexeme "anti-Russian" regarding the national movement in Western Ukrainian lands) (Programma: 5–9 klassy, 2019, pp. 39–49, 53–61).

In Grade 10, the lexemes "Ukraine" or "Ukrainian" were used only three times, twice as derivatives ("Ukrainization", etc.). In Grade 11, these lexemes were used 20 times (of which derivatives – 5 times), and in seventeen cases with a negative connotation (in the context of the collapse of the USSR, relations with Donbas before and after 2014). Instead, the lexemes "Russia"/"Russian" were used in Grade 10 90 times (the lexemes "USSR", "Soviet" were also used in the same meaning 76 times), in Grade 11 – 89 times (the lexemes "USSR", "Soviet" were also used 142 times) (Programma: 10–11 klassy, 2019, pp. 16–46).

National and cultural revival as a component of state-building processes. The syllabus for Grade 9 "History of Motherland" course (covering the 19th century) avoids mentioning of Ukrainian nation-building. Vitaliy Yaremchuk drew attention to the "imitation" of Russian school History textbooks, which inform about the formation of national consciousness, for example, the Belarusians, while continuing to call the Ukrainians "Malorosy", as if there were no Ukrainian national revival. (Yaremchuk, 2023, p. 185).

If the 2017 syllabus for Grade 9 still includes the item "introducing them [students – *Author*] to the spiritual values and cultural achievements of the Ukrainian and other peoples of their native land..." in the list of expected results after studying the course (Programma: 9 klass, 2017, p. 20), in the 2019 syllabus we do not find clear references to the Ukrainian people.

Returning to the analysis of the 2019 syllabus, we draw attention to the subtopic "Public Movement and National Policy in the 30s-50s of the 19th Century". The syllabus compilers, for example, mentioned national policy in the Kingdom of Poland and the issue of Jews in the Russian Empire. Then comes the following text: "The situation in the Western Region (Cyril and Methodius Student Society)" (Programma: 5–9 klassy, 2019, p. 55). The question arises: whose situation is the sentence referring to? In this case, the authors do not specify the information that should connect these events specifically with the Ukrainians. By the way, in the 2017 syllabus, students are required to give examples of Russian, Ukrainian, and Polish social movements in the 20s – 50s of the 19th century (Programma: 9 klass, 2017, p. 16). In the 2019 syllabus, the compilers noted that students should name the main directions of social movement of this period, i. e. they avoided clarifications that would specify the movements, including the Ukrainian one (Programma 5–9 klassy, 2019, p. 56).

The next important point that is worth emphasizing is the mention of Ukrainian movements, contained in Topic 4 "Russian Empire and Donetsk Region in the 2nd half

of the 19th Century (Social and Political Aspect)". The compilers defined the community movement, of course, mentioned Muscovism and Malorosiystvo, and separately highlighted the trend of the independentists: "Dual Loyalty of the Ukrainian Elite. The "Separatist" Current (N. Mikhnovsky, Yu. Bachynsky). Its anti-Russian Orientation" (Programma: 5–9 klasy, 2019, p. 58).

Firstly, it seems interesting that the authors singled out Yulian Bachynsky, because in general they ignore historical events related to Western Ukrainian lands and do not pay attention to figures from Western Ukraine. Secondly, they interpreted the views of Ukrainian independentists from an "anti-Russian" perspective, avoiding the main goal of the independentists – the unification of Ukrainian lands. Thirdly, the authors nevertheless acknowledged that there was a separate Ukrainian elite, but ignored information about the Ukrainian national revival.

The desire to lay bare the historical foundation of the fake republic. In the 2019 syllabus for Grade 10, Topics 3 and 4, dedicated to the events of 1917 – 1918, deserve a chief focus. The course of the Ukrainian national liberation struggle is presented as the events of "... the Great Russian Revolution in the national outskirts of Russia" (Programma: 10–11 klasy, 2019, p. 20).

In Topic 3 there are mentioned the Ukrainian Central Rada and its universals, but there is no information about the creation of the Ukrainian People's Republic, although this event is central in the context of the UCR's activities. That is, the authors of the syllabus kept quiet about the fact of creation of the Ukrainian national state in modern period. Instead, the so-called "alternative congress of Bolsheviks" in Kharkiv is presented as an event of all-Ukrainian significance (which is a distortion). Without any doubt, the purpose of such a presentation of the material is to form the idea that Ukraine first emerged as the Soviet republic: "All-Ukrainian Congress of Soviets of Workers, Soldiers and Peasants' Deputies (Kharkiv)" (Programma: 10–11 klasy, 2019, p. 20).

Indeed, we clearly respect the obligations of the Donetsk-Kryvorizka Republic. Despite the fact that the level of representation at the time of the DKR declaration was low: it was voted for, less than 50 votes, in Kharkiv on February 12, 1918 (Soldatenko, 2011). This is the example of instrumentalization of history by syllabus compilers. The reason is that the fake republic "dnr" looks for its historical background in the DKR, seeking to represent the former as a historical continuity. In February of 2015, deputies of the People's Council of the "dnr" expressed their support for the Donetsk-Kryvorizka Republic (Smirnov, 2015).

When considering the syllabus for Grade 11, let's focus on some indicative aspects. In general, the Soviet period is presented to the youth of the occupied Donetsk region in exactly the same way as to Russian schoolchildren. Based on the aforementioned scientific research by Vitaliy Yaremchuk, we should note the key moment when the "Country of Soviets" is seen as a "multi-ethnic state", and not an imperial entity with manifestations of Russian great-power chauvinism (Yaremchuk, 2023, pp. 186–187).

In the syllabus the period of the 1930s is presented as "The USSR during the period of Stalin's modernization. Features of modernization in Donbas" (Programma: 10–11 klasy, 2019, p. 25). "Modern Ukrainian historical science clearly disagrees with this formulation, the period cannot be called "modernization" period, if there was a massive direct decrease in population".

The national direction of the Resistance Movement and the proclamation of the Ukrainian state during World War II. It is not surprising that the syllabus authors use

ideological clichés of Soviet historiography, such as the “Great Patriotic War,” which have become basic in modern Russian historiography. It should be noted that the scope of the topic of the “Great Patriotic War” is much larger compared to others.

The syllabus does not contain any information about the “Act of Restoration of the Ukrainian State” of June 22, 1941. In addition to the fact that this is an important event in the history of Ukrainian statehood, we should also note that after the adoption of this document, the OUN(b) began preparations for the opening of a new front – the anti-German one (Trofymovych, & Trofymovych, 2019, p. 93). Instead, within the framework of the topic, fighters for Ukrainian independence (for example, Stepan Bandera and his followers) are attributed to collaborationists and the German occupation regime: “... The Nazi “new order”... Collaboration with the enemy: reasons, forms, scale (the Vlasovtsi, the Banderivtsi and other Nazi collaborators)” (Programma: 10–11 klasy, 2019, p. 29).

The national and human rights struggle of Ukrainian dissidents during the period of the 1960s – 1980s is presented by the authors of the syllabus rather vaguely and cursorily. In Topic 4 “The USSR and Donbas in the era of “stagnation””, students must understand the concept of a “dissident movement”, characterize the dissident movement and its features (Programma: 10–11 klasy, 2019, pp. 36–37). However, the compilers did not mention the Ukrainian dissidents at all, in particular, such prominent figures who are directly related to the history of Donetsk region, such as Oleksa Tykhyi, who is originally from Donetsk region, or Vasyl Stus, whose childhood and youth are also connected with Donetsk region.

Restoration of the Ukrainian state. In the context of analyzing the syllabus text through the prism of the Ukrainian statehood concept, the issue of Ukraine’s independence restoration in 1991 deserves attention. This event is not specifically mentioned in the syllabus, but is reflected within the sub-item dedicated to the collapse of the Soviet Union in Topic 5 in the syllabus for Grade 11 “The USSR and Donetsk Region during the Period of Perestroika” (Programma: 10–11 klasy, 2019, pp. 37–39). Despite the fact that the main provisions of the syllabus are presented in a balanced manner and the collapse of the USSR is linked to “national movements” in the republics (“Crisis of interethnic relations and rise of national movements. Confrontation between the union centre and republics. Beginning of the collapse of the Soviet state. Parade of sovereignties” (Programma: 10–11 klasy, 2019, p. 38)), The academic achievements of students include the requirement to be able to give examples on “the destructive role of Ukraine in the collapse of the USSR” (Programma: 10–11 klasy, 2019, p. 39).

This provision carries two messages for the Ukrainian youth in the temporarily occupied territories: it instills a negative attitude towards the fact of the collapse of the Soviet empire and places responsibility for this process on Ukraine. And this despite the fact that Ukraine was the ninth of the fifteen republics to declare sovereignty (Russia did so a month earlier and was the sixth), and was the sixth one to leave the USSR, unlike its predecessor republics, after the coup.

The war unleashed by Russia in 2014, followed by a full-scale invasion in 2022, is qualified as a powerful impetus for completing the process of Ukrainian nation-building and is a challenge to Ukrainian statehood (Politychnyi protses, 2022, pp. 686–688). The beginning of the hybrid war in 2014 in the East and South of Ukraine in the school curriculum in the occupied territories requires a chief focus. In Topic 7 “The New Course of “New” Russia”, the annexation of Crimea is presented in the syllabus in the sub-item “Foreign Policy of Russia at the Beginning of the 21st Century” and is interpreted as “Crimean crisis 2014”. But despite

the fact that the event is attributed to foreign policy, there is not a single word about Ukraine, as if the territory of the Autonomous Republic of Crimea had no relation to the Ukrainian state. According to academic achievements, the annexation of the Crimea is considered as “reunification of the Crimea with Russia”, in addition to this provision, students should also characterize “the reaction of the population of Russia to the reunification of the Crimea with Russia, to the situation in Donbas” (Programma: 10–11 klasy, 2019, p. 42).

Events after 2014 found a distorted interpretation in Topic 8 “Donbas in 1991 – 2013. Proclamation and Development of the Donetsk People’s Republic”. Thus, the territories of the Donetsk and Luhansk regions controlled by Ukraine are called “occupied”, and the political life in the Ukrainian state is labelled as having elements of “neo-nazism”: “The policy of Kyiv government in the occupied territories of the DPR and LPR. Russophobia and Neo-Nazism as Elements of Socio-political Life in Modern Ukraine” (Programma: 10–11 klasy, 2019, p. 44). In general, Donbas during the years of Ukraine’s independence is presented as a special region, while the role of the Ukrainian state in relation to it is portrayed negatively: “Consequences of Ukrainian Independence for Donbas” (Programma: 10–11 klasy, 2019, p. 43). Separatist tendencies in the region are described as if Donbas had never been part of Ukraine, but existed separately.

Conclusions. Analysis of the syllabus convinces us that it has an anti-Ukrainian orientation and is a tool of hybrid warfare, therefore, it poses a threat as a factor that directly affects the formation of Russian identity among schoolchildren. The suppression of meanings of Ukrainian history and the Ukrainian state-building process in school History education syllabus in the temporarily occupied territory of Donetsk region is aimed at forming among the youth of this territory the idea that Russia has the unquestionable right to interfere in the internal affairs of modern Ukraine and to claim the territory of a sovereign state. This forms in the minds of schoolchildren the idea that “in reality” Ukrainian territories are “originally Russian lands”. The ideology of the “Russian world,” which is promoted by school syllabus in the occupied territories, is a way to spread a new type of totalitarian ideology – “racism,”¹ which is designed to destroy sovereign countries and commit both physical and mental genocide.

The syllabus analysis of different years makes it possible to conclude that each time there were significant new edits to its text in order to completely abandon the terms and concepts of Ukrainian historical science translated into Russian and to use the language standards of Russian historiography in the syllabus. The authors and/or peer-reviewers of the 2015 syllabus had not yet acquired sensitivity to the language of Ukrainian historical science as a language hostile to the ideology of the so-called “dnr” and partially used Ukrainian texts (possibly syllabus and textbooks on the history of their native land). The 2017 edition shows the replacement of most terms and meanings with the Soviet/Russian ones, but the content still retains some of the accents of Ukrainian historical concepts and the use of historical and ethnographic names of Ukrainian lands. The 2019 edition demonstrates a new round of censorship, the aim of which is to finally eradicate all formulations in the content that create the impression that there was a continuity of the Ukrainian state-building process on the territory of modern Ukraine. A rhetorical question arises: who was the peer-reviewer who caused gradual changes in the syllabus, and where to look for him geographically?!

¹ The interpretation of “racism” as a new type of totalitarian ideology was officially approved by the Verkhovna Rada of Ukraine in the Statement: “On the use of the ideology of racism by the political regime of the Russian Federation, condemnation of the principles and practices of racism as totalitarian and misanthropic”.

After the liberation of the currently occupied territories of Donetsk and Luhansk regions, the public and political leadership of the Ukrainian state will face an acute problem of readaptation of children and youth who were under the pressure of anti-Ukrainian propaganda.

Further research into the problem requires the analysis of correlation between the components of the history of Russia and the history of Donetsk region in the “History of Motherland” syllabus, its analysis at the structural and logical level, and the application of a multi-level analysis of World History syllabus in the temporarily occupied territories.

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РЕЦЕНЗІЇ / REVIEWS

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**A NEW STAGE OF HISTORIOGRAPHIC UNDERSTANDING
OF THE UKRAINIAN REVOLUTION PHENOMENON**
(the peer-review on the monograph: Oleksandr Reyent, Volodymyr Velykochy.
The Ukrainian Revolution: Modern National Historiographical Discourse.
Kyiv, Ivano-Frankivsk: Publishing House “Misto NV”, 2024. 396 p.)

**НОВИЙ ЕТАП ІСТОРИОГРАФІЧНОГО ОСМИСЛЕННЯ
ФЕНОМЕНА УКРАЇНСЬКОЇ РЕВОЛЮЦІЇ**
(рецензія на книгу: Олександр Реснт, Володимир Великочий.
Українська революція: сучасний вітчизняний історіографічний дискурс
Київ, Івано-Франківськ : Вид-во “Місто НВ”, 2024. 396 с.)

Reasonably each new monograph in the genre of analytical historiography always attracts more attention of experts than a monograph on a specific historical topic. Historiographic monograph marks the entry of historical science, its reflective component, into a new stage. It is the mass of historical literature, not individual publications (no matter how valuable and resonant they may be), that form the basis for the historiographical understanding of our ideas about the Ukrainian past. In this sense, the monograph by O. P. Reyent and V. S. Velykochy “Ukrainian Revolution: Modern Domestic Historiographical Discourse” is precisely a marker of the entry of Ukrainian historical science into a new, more qualitative stage of theoretical, methodological and historiographic understanding of the phenomenon of the Ukrainian Revolution at the beginning of the 20th century. There is no doubt that the Ukrainian Revolution, among other events in national history, has been at the epicenter of scientific discussions for over 100 years, generating, according to the authors of the

monographs, such a mass of historical literature that only the era of Bohdan Khmelnytsky can be compared with in national history (p. 3), but also sharp political debates both within the country and in international (interstate) relations. The topic of the Ukrainian Revolution is a classic example of history instrumentalization in favour of opportunistic political views.

In the author's preface to the monograph there is clearly outlined the goal of this study: to offer, first of all, to scientific co-authorship, as well as to the general public, a compendium of knowledge about the Ukrainian Revolution, the main approaches to its coverage in national historiography. Therefore, the main emphasis is focused on, figuratively speaking, the "nationalization of the revolution". The Ukrainian revolution is not the "Great October Socialist Revolution in Ukraine", not a consequence of the Russian revolution, but a phenomenon of national history and one of the landmark events of European and world history.

There should be mentioned provisions of the monograph by O. P. Reyent and V. S. Velykochy which differ from the more or less determined points of view on the events of the Ukrainian Revolution, and also sometimes contradict stereotypical receptions of the revolutionary era phenomena. Firstly, the authors suggest considering the Ukrainian Revolution in a broader chronological framework, namely 1914 – 1923, rather than 1917 – 1921, which is common among the majority of researchers. Secondly, the Ukrainian Revolution is interpreted as an important component of the "Great Eastern European Revolution", including Great/World War I of 1914 – 1918. Thirdly, the authors set out to look at the Ukrainian Revolution as a phenomenon of a conciliar nature, which was supposed to lead to the revival of Ukrainian statehood within ethnic borders, granting the entire Ukrainian people the status of a sovereign Ukrainian nation, a full-fledged subject of international politics. Thus, the authors of the monograph gave rise to a new concept in the historiography of the Ukrainian Revolution – the national conciliar one. This concept also explains the new chronotope of the Ukrainian Revolution – 1914 – 1923, substantiated by the authors. At the same time, World War I is an organic component of this phenomenon. Having in their scientific output numerous studies on the history of the Great War, O. P. Reyent and V. S. Velykochy convincingly prove that the war catalyzed the national-state efforts of the Ukrainians, contributed to their self-knowledge and transformation into a nation. The Treaty of Riga (1921) cannot complete the chronological framework of the Revolution, because the struggle of Ukrainians for the right to be masters of their land continued for at least next two years – 1922 and 1923, which was manifested in social, economic, military, and foreign policy spheres. The authors have already announced the new version of the chronological framework of the Ukrainian Revolution (1914 – 1923) earlier, before the publication of this monograph, at scientific forums organized by the Institute of Ukrainian History and the UINP, and on the pages of the "Ukrainian Historical Journal", but there is neither clear denial, nor a general approval of such a chronotope. The relevant specialized department of the Institute of History of Ukraine considers the chronological framework – 1917 – 1921. It is obvious that discussions on these issues are still ahead at forums. And it is the authors of the peer-reviewed monograph who should organize and moderate such forums.

The historiographical understanding of the phenomenon of the Ukrainian Revolution of the early 20th century is of decisive importance to the entire process of modern Ukrainian historiography formation. The authors of the monograph are well aware of it. According to O. P. Reyent and V. S. Velykochy, the Ukrainian Revolution is a "core phenomenon in national history", "a mental component of a new paradigm of the national history formation and representation". And, therefore, the formation and implementation of a new or updated

concept of the Ukrainian Revolution should become an important component of the national historical narrative. Researchers of the history of the Ukrainian Revolution, the results of whose work over thirty years were presented by the authors of the monograph (“compendium”), have achieved significant success in overcoming many false postulates of the initial version on the Revolution concept, which developed at the beginning of the 21st century. The most difficult thing to overcome was the overt dependence of the Ukrainian Revolution on the Russian one, the conscious following of the Russian “fairway” instead of considering it as a component of revolutionary processes of a pan-European nature, which prevailed in historiography. Similarly, under the influence of the fact that before the Great War of 1914 – 1918, Ukrainian lands belonged to the territories of two empires – the Russian Empire and the Austro-Hungarian Empire, historians viewed the Ukrainian Revolution as two different processes that arose at different times, had different durations, intersected at a certain stage, united for a short time, but later diverged again. Thus, separate concepts and, accordingly, separate definitions appeared – “The Ukrainian Revolution of 1917 – 1921” and “The November National Democratic Revolution in Western Ukrainian lands of 1918”. Enormous intellectual efforts were expended by the authors of the monograph to formulate in historiography the idea of, in fact, the unity of these processes. It was O. P. Reyent and V. S. Velykochy who became the authors of the new concept of the Ukrainian Revolution – national conciliar.

With great effort, the so-called “Kyiv-centrism” was overcome in the historiography of the Ukrainian Revolution, when all the defining events of the revolutionary era were tied to the capital, while ignoring the deeper and more important processes of the formation of the Ukrainian nation as a political one, which took place at an accelerated pace before the Great War in the Ukrainian “Piedmont” – Galicia. It should be noted that the authors of the monograph – O. P. Reyent and V. S. Velykochy – contributed not only to the scientific understanding of the national conciliar phenomenon of the Ukrainian Revolution, but also directly participated in the initiation and implementation of the scientific, research, and educational project “Conciliar Ukraine (Spiritual Axis of Ukraine)”. During the period of 2004 – 2005, a series of conferences, round tables, and seminars were held, and four scientific collections “Ukrayina Soborna” (Conciliar Ukraine) were published. The theoretical methodological, institutional, and didactic aspects of this project marked a significant shift in understanding the phenomenon of Ukrainian Sobornism and a new view of the Ukrainian Revolution through the prism of Sobornization. Discussions on the very concept of “conciliarity” rose to a higher level. It should be taken into account that the concept of “conciliarity” appeared in documents of the revolutionary era rarely, and the understanding of conciliarity of the Ukrainian nation and conciliarity of the Ukrainian statehood in the ideas of contemporary figures did not often coincide. Historiography was captive to an ambiguous interpretation of sobornosty – in a narrow sense, limited by the Act of Union of January 22, 1919, and in a broad sense – as a continuity of processes of state-political, territorial, spiritual, and cultural unification. Historians have argued two levels of understanding of conciliarity – as the unity of all Ukrainians regardless of their place of residence and as the state-national unity of all who live on the Ukrainian ethnic territory. Ukrainian conciliarity involves achieving both ethno-territorial unity within the framework of one national state and the spiritual unity of its entire population, regardless of ethnicity, religion, social status, etc. Owing to the studies by O. P. Reyent and V. S. Velykochy, as well as their fellow historians specializing in the study of the Ukrainian Revolution, whose

works collectively have become a body of historical literature that signifies the overall rise of the historiography of the revolutionary era to a new level. The once myth of “conciliarity”, which dominated political discourse, acquired a scholarly status in history, political science, Ukrainian studies, and other fields of the humanities. But the authors warn that in reality the processes of soborization were not so linear and unambiguous, and the attempt mechanically and immediately unite parts of the nation oriented towards different political traditions could not but be accompanied by difficulties and even failures. It is known that, for example, at the initial stage of the Ukrainian Revolution, both “under Russian rule” (Naddniprianska) and “under Austrian rule” (Galicia) parts of the Ukrainian people sought unification, but as soon as it was formalized by relevant legal acts (universals), immediately centripetal tendencies began to dominate, which led to the rupture of national state-building camp and the loss to more powerful enemies – Bolshevik Russia and Poland.

It is natural that O. P. Reyent and V. S. Velykochy devoted a significant part of their monographic study to the historiographical understanding of the reasons for the defeat of the Ukrainian Revolution of the early 20th century. They share the consolidated opinion of Ukrainian historians that the defeat of Ukraine’s liberation struggle was caused by the internal weakness of the national movement, the insufficient degree of its maturity and consolidation at the time and in the process of decisive actions, and the multi-vector nature of its political forces. It is quite clear to modern historians that, despite the difference in the maturity of the Ukrainian movement in eastern and western Ukraine, the common weak point of national politicians was the too-long parliamentary and federalist illusions of the political elite (both in relation to Russia and Austria), the underestimation of the neglect of force factors, primarily the army and military personnel, in building a national state. There was a lack of consolidating efforts by the political leadership to unite the entire population around the restoration of the Ukrainian state. Political leaders of the first plan met the era of liberation struggles with varying degrees of compliance with the requirements of the moment. S. Petliura, P. Skoropadsky, V. Vynnychenko, M. Hrushevsky, M. Mikhnovsky – the politicians who had noticeably controversial views, were at odds with each other and, a priori, could not act as a consolidated unifying factor of the Revolution. Having objectively analyzed the reasons for the defeat of the Ukrainian Revolution in a scientific (historiographic) sense, the authors led the scientific community and, importantly, Ukrainian society to possible praxeological answers to the sacramental question: why, for example, Finland, Poland, etc. were able to gain (restore) independence at the beginning of the 20th century, while Ukraine was not.

The architectonics of the monograph by O. P. Reyent and V. S. Velykochy is dictated by the ideological content of the study. This study consists of previously published scientific research and specific historical and historiographical articles, and conference materials. That is, the texts have already been approved in advance in both scientific and educational circles. Compositionally, the monograph consists of four sections: “Theoretical and Historiographical Foundation of the National Concept”; “The Great War and the Ukrainian Revolution”; “Doomed to Be” (the metaphorical title of this section falls out of the general framework of definitions, but is motivated by the author’s style of presenting the main subjects of the revolutionary era – state formations, personalities, political structures, military formations); “National Unity: from Theoretical Aspirations to the Consequences of Practical Implementation”. Re-publication of previously published studies in a different composition and with a new ideological concept is a possible option for the creative workshop of the historians. Some may criticize this approach, there were even critics who came up

with a vague definition of “self-plagiarism” (!). Back in 2005, one of the authors of this monograph, O. P. Reyent, published a collection of his own studies with a provocative (in a positive sense) title for the professional environment, “Rereading the Written”. Not everyone then agreed with the author’s bold reputational and scientific position – once again to turn to his own studies and, over time, draw conclusions about their scientific value. Only those historians who write for the future, who are not biased by the political situation and are not captive to “media history or fashion” for a “blogger flavour” can do this. Authorial revision of previously published studies is a methodological necessity. This is how the scientific need to rewrite history based on a new methodology and involving new sources is realized, which has nothing to do with the politically opportunistic “rewriting of history” within the framework of one political regime.

The combination of previously published studies in one monograph somewhat neutralized the author’s positive idea: there are repetitions of the same plots, the presentation of the material has acquired a discrete character, which in some moments led to the violation of a chronological sequence. Historiographic generalizations and conclusions are scattered in the text of the monograph. One can agree with the authors of the monograph that the concept they currently suggest “represents a rather schematic initial version”. In the monograph O. P. Reyent and V. S. Velykochoy have formed “main areas of research” that will allow it to be filled with a broader factual and historiographical material, subject to further study. It is easier to reproach the authors of the peer-reviewed monograph for what they did not do than to analyze the written texts. The list of hypothetical additions to the creation of the narrative can be endless. In our case, the main suggestion to the authors is the need for additional research into foreign historiography. The domestic historiographical discourse of the Ukrainian Revolution is represented fully and structured well. However, there is a critical lack of analysis of the historiography, for example, of Poland, Austria, Hungary, Germany, and other European actors during the period of the liberation struggles of the early 20th century. The position of modern foreign historians regarding the process of Ukrainian history emerging from the shadow of the so-called “Great Russian” history is of significant cognitive interest and practical significance. In order to separate modern Ukrainian historiography from the Russian one completely and definitively, it is also worth, even in times of war, to study Russian historiography in depth and in detail. It would also be very useful from a scientific point of view to present the achievements in the field of historiography of the Ukrainian Revolution in the newly created Encyclopedia of the History of the Revolution by the Institute of History of Ukraine of the National Academy of Sciences of Ukraine (Professor V. F. Verstiuk).

Unfortunately, we cannot ignore another problem that is a chronic disease among the members of the National Academy of Sciences. Scholars, even being members of the Academy, are forced to find funds for their studies themselves. The Academy’s participation has been reduced to one thing – to be in the “cap” on the title page of the monograph. The basics and principles of editology – the science that teaches how to transmit scientific information to society – are further discredited by the notorious phrase in the source data: “the text is published according to the author”. Authors are forced to perform functions that are not typical of them: searching for investments, typing and proofreading texts, artistic design, etc. As it has not been before, there is no infrastructure of historical science in Ukraine today. Without it, history will not be able to fulfill the consolidating and self-identifying mission necessary in wartime fully.

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**HISTORIOSOPHICAL DIMENSION OF DEPORTATION PROCESSES
ON THE TERRITORY OF THE UKRAINIAN-POLISH BORDERLANDS IN 1944 – 1951
(the peer-review on the monograph: Artemyshyn Yu. Deportation Actions of the 1940s
in the National Memory of the Ukrainians: State and Prospects of Research : monograph /
NAS of Ukraine, I. Krypiakevych Institute of Ukrainian Studies. Lviv, 2023. 276 p.)**

**ІСТОРИОСОФСЬКИЙ ВИМІР ДЕПОРТАЦІЙНИХ ПРОЦЕСІВ НА ТЕРЕНАХ
УКРАЇНСЬКО-ПОЛЬСЬКОГО ПОГРАНИЧЧЯ У 1944 – 1951 рр.
(рецензія на монографію: Артемишин Ю. Депортаційні акції 1940-х років
у національній пам'яті українців: стан та перспективи дослідження : монографія /
НАН України, Інститут українознавства ім. І. Крип'якевича. Львів, 2023. 276 с.)**

The monograph by Yuliia Artemyshyn focuses on the study of deportation actions of the 1940s that took place on the Ukrainian-Polish borderland, the traumatic and tragic events of 1944 – 1951 in the context of Allied policy during World War II, as well as the formation of post-war borders in Europe. The author set herself an ambitious goal of creating a holistic, comprehensive image of deportation, going beyond the scope of the event history, as well as recreating a social and socio-psychological aspect of the issue, namely: the reception

of deportation process by the deportees, key features of socio-psychological and material adaptation; to reconstruct their life trajectories based on archival and oral history materials, to form historical, national memory about the war, forced deportation, and the image of “small Motherland”.

In the study there are clearly outlined the goal and research objectives related to its implementation. The chronological boundaries of the study are defined correctly.

The monograph includes Introduction, four Chapters, Conclusions, Appendices, Nominal and Geographical Indexes, which outline the logically grounded structure of the presented research. The text is preceded by a list of conventional abbreviations.

In the chapter “Historiographic, Theoretical and Methodological Foundations of the Study” there is a broad historiographic overview of the issue, which characterizes the source base of the study, reveals the essential features of historical memory and traumatic experience as an object of study, as well as the peculiarities of studying the border region and the multiple identities of its inhabitants. Carefully analyzing historiography of the issue topic under study, the author of the monograph focuses on the least researched aspects and legal grounds of deportation, on the international legal evaluation of these events by the Ukrainian and foreign scholars, revealing repressive nature of actions carried out and a corresponding development of the Soviet legal framework.

Successfully comparing the research by the Ukrainian and foreign scholars, Yu. Artemyshyn shows that in the Ukrainian historiography, the issue of deportation and related problems was mostly studied in the section of political history (a kind of response to a political order), instead, there are no comprehensive studies on the application of anthropological visions of history, and historiosophical dimension and related problem of collective memory require further development, expansion of the range of sources, and introduction of new methods and approaches, which becomes the researcher’s calling.

A core component of the source base of the study is the recorded and analyzed memories of people from Chełm region, Nadsiania and Lemkos regions, as well as the results of the author’s interview and sociological survey conducted by the researcher with a combination of open and closed questions in the questionnaires. The researcher used narrative analysis methods. The sample includes the surnames of deportees, their descendants, mostly from Western Ukraine, and young people from the eastern regions of Ukraine.

A separate group of sources consists of materials stored in the State Archives of Lviv Region and archival files of convicted people stored in the sectoral archives of the Security Service of Ukraine. There have been used the published memoirs of people, both in Ukraine and Poland, documentaries, programmes about resettlement, and video materials. Collections of documents have been also used, which reflect the regulatory framework of deportations and the Ukrainian-Polish conflict, both from the Soviet period and published during the time of Ukrainian independence, as well as in Poland.

Yu. Artemyshyn successfully uses materials from the Ukrainian and Polish press in order to trace the inclusion of the issue under study in the collective memory of the Ukrainian and Polish population, the positions of various ideological circles, the dynamics of views and evaluations, including those of public figures, historians, and public intellectuals.

It is necessary to note the author’s great work in systematizing the sources used, her correctness, scientific objectivity in using data, taking into consideration the possible presence of constructed reality, especially in documentaries, author’s programmes, and journalism, where author’s opinion is represented.

The author of the study conducted a comprehensive analysis of the concept of “historical memory” as an interdisciplinary phenomenon, as a certain socio-humanitarian concept; presented a holistic picture of the study of historical memory from the perspective of anthropological turn in modern historiography, and also elucidated different approaches to interpreting the object of her research by the Ukrainian and foreign researchers (Astrid Erll, Maurice Halbwachs, Marc Bloch, Pierre Nora, Jan and Aleida Assmann, Alan Confino, Eva Domanska, Marian Golka, etc.). The researcher characterized different dimensions of historical memory: collective and individual, as well as models of their construction using the concepts of “place of memory”, “communicative memory”, “cultural memory” and “regional memory”. At the same time, Yu. Artemyshyn rightly agrees with Astrid Erll’s opinion that the terminological heterogeneity of the concept of “historical memory” allows sciences such as history, psychology, sociology, and literary studies to conduct a methodological dialogue.

In the monograph there is revealed how collective memory influences the construction of personality, its awareness of personal and collective experience, and its identity. The dynamic aspect of collective, cultural memory is studied, presented as a living, active process influenced by the interaction of three types of historical factors: intellectual and cultural traditions, “memory creators” and “memory consumers” (Wulf Kansteiner). A vivid, emotionally charged memory, enhanced by communication technologies, partly carries within itself the traumatic experience of certain events, i.e. it has a traumatic dimension. In this part of the monograph, the researcher shows herself as a subtle analyst of socio-psychological phenomena, with an understanding of modern technologies and methods of influencing a personality, deep processes in a human soul.

In the context of the multiplicities of memory, their varieties, taking into account the traumatic historical experience of World War II and the Holocaust in the 20th century, in the monograph there is presented and characterized the direction of post-memory research, the author of which is Marianne Hirsch.

It is post-memory that is formed in the context of the memory of subsequent generations, as a reflection of traumatic events, of individuals who did not directly experience them, but who adopted the memory of experience from the loved ones, relatives, and can be transmitted in a hyperbolic, exaggerated manner.

According to Yu. Artemyshyn, understanding the mechanisms of post-memory allows us to understand and comprehend the creation of narratives of deportees and their descendants more deeply. The researcher emphasizes the importance of studying methodological principles of the analysis of traumatic experience. There should be noted an undeniable psychotherapeutic effect of such analysis.

Pointing out that the concepts of “suffering” and “heroism”, with a significant advantage of the former, are firmly rooted in the collective memory of the Ukrainians, in the author’s opinion, it is worth resorting to new research concepts in the context of victimization of the historical past, namely: trauma, collective trauma, in order to reconstruct and understand the creation of a collective image of deportation.

Professionally, in the monograph, there is justified the methodological direction of the research through the concept of “trauma” and its application in socio-humanitarian disciplines, referring to thorough research in psychiatry, neurology, psychology, revealing the mechanisms of spread, awareness of trauma in a team, and features of verbalization of traumatic experience.

The relationship between the concepts of traumatic experience verbalization, traumatic memories, oral history, as components of historical memory research, as methodology for

reconstructing the past, and the features of its application in the Ukrainian historiography, are also evidently revealed. The challenges that researchers face when applying the presented approaches and theories are traced.

Yu. Artemyshyn offers a detailed analysis of the key concepts of the study, a description of terminological discussions due to their complexity and multifacetedness, the lack of established terminology in socio-humanitarian disciplines. Accurately the researcher depicts spatial, cultural and socio-psychological models of the borderland, their complex, nonlinear and contradictory architectonics.

The researcher shows how the transformation of borders affects people's consciousness, changes the self-awareness of individuals and communities. A special identity is created based on the functioning of new – old norms, ideologies, value approaches; a new mental manifestation of the borderland is being created, a new cultural space, a regional subculture, a linguistic image that fits into the linguistic picture of the world.

Summarizing significant achievements of psychologists, psychoanalysts, psychiatrists, sociologists, and philosophers, Yu. Artemyshyn psychologically accurately reveals how an individual's identity is created within the framework of a social system, through social interaction (C. Cooley), a common "human heritage" (C. Woodward), a complex and nonlinear network of communications, a variety of social roles and their personal interpretation, and recognition of an individual by others.

The multifaceted pluralism of role choices and their interpretations determines multiplicity of identity, and modern world, full of rapid changes in socio-economic circumstances, technologies, and limited choices, changes the lifestyle of modern people, making their identity less stable, fragmented, and weak.

The author clearly outlines the focus of her own research: the regional/local identity of deported Ukrainians and their enduring connection to the "small Motherland".

In the monograph there is recreated a holistic picture of the interethnic conflict and deportation abroad in accordance with the theoretical and methodological principles defined in the research. The tragic historical circumstances of the Ukrainian-Polish confrontation in the context of World War II are successfully revealed, taking into account the Polish-Ukrainian relations from the end of the 19th to the first half of the 20th centuries, features of the German occupation, and the desire of the Nazis to Germanize the occupied lands quickly, using the loyalty of the Ukrainians and creating a protective zone which consisted of the displaced Ukrainian population around German colonies.

The researcher's objective is to reconstruct the experiences in the historical memory of the participants in these events, to find common trajectories – generalized plot lines of stories about difficult moments experienced, to rethink them in order to ease the burden of personal responsibility due to their complexity. The painful emotional and psychological experience becomes a matrix that organizes the socio-historical reality of that period. It clearly manifests the neurotic contradiction of traumatic experience, caused by the internal conflict between the desire to suppress the terrible event from consciousness and desire to talk about it out aloud in order to relieve mental tension.

The majority of people interviewed by the researcher were children and adolescents, and she took into account the influence of a child's psyche on informativeness, on the image of the past, as well as vulnerability of a child's psyche, the intensity of experiences, anxiety, and destruction of the basic sense of safety and security. The researcher takes into account the fact that, having witnessed events as children, the interviewees build their stories from

the perspective of adults, constructing “phantom plots”. In the monograph there are also traced gender differences in remembering traumatic events, successfully comparing female and male memories.

The monograph demonstrates the author’s high level of mastery in empirical research methods and her focus on verified, reliable results. Owing to this approach, it is possible to show how the construct of collective trauma of immigrants from Poland was created, to analyze the memorialization practices created by the immigrant community, and to reveal emotional reservoir of ideas about events that tend to stereotype. Their creation is a multi-level process, influenced by both the age factor and the psycho-emotional characteristics of the environment, as well as a holistic historical and cultural context.

In the narratives of the deportees, two images that seem mutually exclusive prevail – suffering and heroic struggle, but in fact, they outline the two poles of these events: on the one hand, defeats, losses, betrayal, pain, and on the other – triumph, victory, and the joy of life.

The researcher rightly warns scholars in the field of humanities against unreliable, distorted facts of the past, artificially created visions of the past that are superimposed on images of external enemies. The author thoroughly researches the prehistory of mass deportations in Europe and in the modern history of Ukraine, analyzes in detail the methodological aspects of this issue, the terminology and qualification of deportations. It is noteworthy that the truthful, in fact, for the first time in Ukrainian historiography, reproduction of the experience of immigrants entering a new society against the background of a previous ethnic cultural, religious one, property and natural geographical differences of the regions of new residence, a multivariate nature of life situations, the peculiarities of entry and adaptation to the new conditions of the Soviet reality, efforts to preserve socio-cultural integrity, etc.

Accordingly, the author’s definition of identity as a mechanism for a person’s mastery of reality, during which a system of meaning formation is established and awareness of one’s own place in society and the world, seems justified and reliable.

For deportees, the space of the lost homeland created in memory serves as the primary support for perceiving oneself in the world and building a national identity. In the hierarchy of values, this level of identity is of great importance. The feeling of longing, nostalgia remains with them and corrects the worldview of linguistic life circumstances.

An important basis for the monograph is a sociological survey of student youth at Ivan Franko National University of Lviv, as well as coverage of the problem of deportation of the Ukrainians in the pages of the Ukrainian press. Analysis of materials related to deportation and published in Western Ukrainian periodicals, in particular the newspaper “Vysoky Zamok” and regional newspapers, allowed the researcher to see numerous errors and inaccuracies in the interpretation of this issue. The author highlights press materials related to Operation Vistula on the eve of its 70th anniversary, citing the opinions of both Ukrainian historians, politicians, journalists, and Polish government officials and conservatives, considering this problem not only from a political perspective, but also addressing the issue of material compensation for Operation “Vistula”.

The section of the monograph “Deportation Actions in the Media and Everyday Representations: Regional and National Memory” offers a detailed examination of the history of deportation since 1944 and focuses on the issue of popularizing the history of the Ukrainian-Polish border region at the beginning of the 21st century.

A special aspect of Yu. Artemyshyn’s monograph is her turn to cinema and her desire to explore the problem of historical memory and recreate the tragedy of the deportation of

Ukrainians through artistic documentary film. This speaks to the author's comprehensive scientific erudition, which goes beyond the framework of one field of knowledge. The researcher thoroughly analyzed documentary and feature films dedicated to the tragic history of Zakerzonnia during World War II, the depiction of terror and ethnic crimes against the Ukrainians in Poland, and the tragedy of the displaced.

The author does not limit herself to studying the issue of regional and national memory, the Polish-Ukrainian confrontation in the press and cinema; she turns to the reflection of the issue of deportation in fiction and literature in the second half of the 2010s. She analyzes the political essays of the Polish publicist Jacek Kuroń "In the Trap of History" (1997); the collection of essays by Bohdan Skaradzinski "Attention to the East" (1997); Pavel Smolenski's collection "Funeral of the Cutthroat" (2001), and the collection of reports "Syrup of Wormwood" (2017), which are dedicated to the tragic pages of the Ukrainian-Polish confrontation, forced deportation, and the search of national identity. The author also refers to fiction about the deportation of the Ukrainians from Poland, about Zakerzonnia written by the Ukrainian writers, in particular to the novel "Eternal Calendar" (2019) by Vasyl Makhno; the book by Tetiana Ivanitska "My Grandfather was a Polish Immigrant"; the novel by Tetiana Pakhomova "The Schismatic. Children of Cain" (2016).

The researcher devotes the chapter to the peculiarities of historical memory, the concepts of memory transmission and the image of the "small Motherland". Dwelling in detail on the process of creating the image of the "small Motherland" as a way of categorizing space, Yu. Artemyshyn refers to the works of the Dutch historian Frank Ankersmit, the American Andrew Demshuk, the Polish researcher of the category of memory Malgorzata Glowacka-Greiper, and the German scholar Jan Assmann. Yu. Artemyshyn details the concept of the "Homeland of Memory", examines the model of collective memory as an important factor in constructing the personality and the image of the "small Homeland" (Kholmshchyna, Nadsiania, Lemkivshchyna, Boikivshchyna), which can also be considered part of the communicative and cultural memory of migrants. According to the Ukrainian researcher, the image of "small Motherland" is a created image in the minds of immigrants, which at the same time preserves the memory of the past and is associated with the concepts of "place of residence" and "home". The very concept of "home" is an important point of support for deportees "for constructing their own "self", identity and environment." Yu. Artemyshyn's elucidation of the psychobiological phenomenon of reminiscence, associated with the constant appeal in memory to events of the past and the problem of the collective and cultural memory of the Ukrainians, deserves attention.

Thus, the myth of "small Motherland" is gradually being created, about Kholmshchyna, Nadsiania, Lemkivshchyna and Boikivshchyna, the basis of which was the transformation of geographical, political and socio-cultural space-time of "small Motherland", its certain universal sacralization and ideologization, the formation of a new self-identification of a human being associated with the loss of territorial identity.

Conclusions. The monograph is one of the first in Ukraine thorough studies analyzing the deportations of 1944 – 1951 in Ukraine, as well as the reflection of their traumatic process in the minds of the deportees. Reproducing with scientific accuracy the historical, political, socio-psychological, and everyday aspects of the problem is a difficult and responsible task, which Yu. Artemyshyn coped with dignity. The monograph contains rich, comprehensive material that allows us to recreate historical events, the life of the deportees, the dynamics of their experiences, the content of national memory, national feelings, and the comparison

of oneself with the small and large Motherland. The framework of the monographic study did not allow us to go beyond the set goal, and many of the results obtained did not receive further interpretation.

By incorporating empirical research methods (the author's interview and social survey), Yu. Artemyshyn interviewed three generations of deportees who had experienced traumatic and post-traumatic experiences, and this is an unconditional achievement that allows us to reveal deep features of their historical memory, archetypal images, their transformation, and ways of resolving trauma. However, the empirical sample, although mathematically reliable, is not extensive, leaving further scope for research to develop the topic.

Russia's full-scale war against Ukraine in 2022 has brought to the fore the problem of forced resettlement of the Ukrainians carried out by the Russian occupation regime, forced by the circumstances of hostilities in front-line territories. The monograph by Yu. Artemyshyn reflects contemporary realities in Ukraine – Russian aggression against the peaceful Ukrainian people, the annexation of Ukrainian territories, the acute, traumatic reception of what was experienced by the internally relocated people, and the reassessment of values and meanings of life.

Thus, the monograph by Yu. Artemyshyn allows us to more deeply comprehend the entire scope of not only political, but also socio-psychological, socio-cultural problems of our present, to understand the mechanisms of the formation of modern Ukrainian identity.

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**CURRENT CONFLICT OF IDENTITIES
ON THE UKRAINIAN-RUSSIAN BORDERLAND**

(peer-review on the collective monograph: Vermenych Ya. V. The Ukrainian-Russian Borderland in the Space of Identities Conflict in History and Modernity / Editor in-Chief V.A. Smolii. Kyiv: Institute of History of Ukraine, NAS of Ukraine, 2024. 331 p.)

**НОВІТНІЙ КОНФЛІКТ ІДЕНТИЧНОСТЕЙ
НА УКРАЇНСЬКО-РОСІЙСЬКОМУ ПОГРАНИЧЧІ**

(рецензія на колективну монографію: Верменич Я.В. Українсько-російське пограниччя у просторі конфлікту ідентичностей в історії та сучасності / відповідальний редактор В.А. Смолій. Київ : Інститут історії України НАН України, 2024. 331 с.)

Current situation in Ukraine and the world in general, in particular the Russo-Ukrainian War, which became a key factor in changes in the international security system, once again makes us reconsider its origins, causes, and possible consequences. In times of war, the theoretical issues of the essence of war and peace acquire a practical dimension and are the focus of numerous modern Ukrainian and foreign scholars.

In 2024 Yaroslava Vermenych, Ukrainian historian, Doctor of Historical Sciences, Professor, Corresponding Member of the National Academy of Sciences of Ukraine published the monograph “The Ukrainian-Russian Borderland in the Space of Identity Conflict in History and Modernity”. The monograph is devoted to the issue of civilizational identification of Ukraine, the military realities of today, and the factors of emergence of controversial models of historical memory on the Ukrainian-Russian border. The monograph is a significant scientific addition to the study of Eastern Europe intricate identity formation processes, in particular in the territory that has become the site of stark political and cultural contradictions between Ukraine and Russia.

The content of the peer-reviewed monograph is considered to be one of the characteristic features. It should be noted that the monograph is well structured and consists of Introduction, four Chapters, Afterword and Appendices, each of which is aimed at revealing diverse aspects of the identity conflict on the Ukrainian-Russian border. The author made an attempt to trace the dynamics of identities in these territories historically, analyzing not only the political context, but also socio-cultural, linguistic and religious aspects. A chief focus was on the processes of ethnic identification, as well as the issues on the territorial belonging and civic identity under the conditions of modern political crisis.

Due to a comprehensive approach, the monograph highlighted not only global trends, but also discussed issues related to language policy, culture of memory, as well as the influence of historical myths on the formation of civic identity formation in Ukraine and Russia. It should be highlighted how thoroughly intricate mechanisms of identity adaptation to shifts in the external political environment have been studied. It is particularly important when considering war and relationship between the two nations.

Yaroslava Vermenych analyzed a wide historiographical spectrum thoroughly, considered diverse approaches and concepts to the issue of identity in the Ukrainian-Russian borderland, taking into account both historical and contemporary aspects of the above-mentioned issue. The author elucidates the influence of the socio-political changes, cultural factors, and geopolitical context on the identities formation in the region.

The research is an important contribution to understanding the processes taking place in these territories and helps outline the prospects for further development of the region in terms of creation of the “enemy” image and collective consciousness.

A chief focus is on the current state of the Ukrainian-Russian relations, which are viewed, in particular through the prism of the war, the conflict in Donbas, as well as the annexation of the Crimea. There is an in-depth analysis of how these events affect the reception of identities in different social groups and a general narrative of the national unity and territorial integrity in the monograph.

Hence, in Chapter 1 “Conflict Space in Coordinates of Border Philosophy” there is under study a crucial issue, which modern Ukraine is facing – the identity conflict issue on the Ukrainian-Russian borderland, which not only has historical roots, but also has a relevant significance in the context of modern political and social processes. The author focuses on the concept of “border philosophy”, which is an interpretation of the borders and boundaries not only geographical, but also cultural, historical and social intersections. The Ukrainian-Russian borderland becomes a place where historical narratives and cultural identities not only coexist, but also come into conflict, which leads to geopolitical and social tensions. The current state of the “hybrid identity” on this borderland is the result of long-term processes of assimilation, integration and conflict between the Ukrainian and the Russian identities (p. 35).

The historian made an attempt to show how borders become arenas of ideological and cultural clashes, as well as a place where transformations of the national identities occur owing to the concept of the “border philosophy”. Due to the above-mentioned, the Ukrainian-Russian borderland could be considered as a space in which there is constant interaction between diverse cultural, linguistic, and historical traditions, taking on a contradicting character.

Yaroslava Vermenych brought together concepts from history, philosophy and cultural studies in order to provide a deeper understanding on the issues of the conflict on the borders between Ukraine and Russia. Understanding the specifics of the conflict requires the application of the concept of “border philosophy”, which offers a new perspective on space as a site of intersections – not just geographically, but also culturally and identity-wise – and aids in comprehending the intricate dynamics that occur on the boundary between two powerful cultures and nations.

Chapter 2, which is called: “Formation of Trajectories of Identity Development,” deals with the complex processes of interaction of the national identities at the intersection of the Ukrainian and Russian history, culture, and politics. There is the analysis of the stages of identity development on the Ukrainian-Russian borderland in the chapter, where the space of conflict between cultural, linguistic, and political aspects has become a key factor. The author emphasized the importance of historical narratives emerged in both countries in the context of the imperial and post-imperial processes, which brought about contradictions in the national identities formation. “In the historical dimension, the border acts not only as geographical, geopolitical, or administrative, but also as a psychological boundary” (p. 89).

The emphasis on the variability of identities in time and space is considered to be one of the crucial aspects of the section. The author highlighted that the identity issue became central under the conditions of the conflict in eastern Ukraine and was of utmost importance not only at the level of political and social processes, but also in the context of cultural and interpersonal relations. The Cossack era became a defining stage in the process of forming the Ukrainian national identity and statehood. It was the Cossacks, as a socio-political and military phenomenon, that laid the foundations of an autonomous state formation and contributed to the consolidation of the Ukrainian society around the idea of self-government and national independence. The Cossacks influence could be traced in modern national symbols, political ideas and military traditions of Ukraine (p. 111). It should be noted that the scholar drew attention to the polarization of identities in the modern context. The scholar highlighted how cultural and linguistic barriers between Ukraine and Russia became an obstacle to the development of mutual understanding, which leads to the aggravation of conflicts.

Hence, the section is an essential study due to which it is feasible to understand the complex nature of the conflict on the border of identities, determined by both historical factors and contemporary political conditions.

Chapter 3, entitled “Constructing Religious Identity”, draws attention to how religious ideas and practices influence the formation of political, social, and cultural borders between Ukraine and Russia, which is particularly relevant in the light of recent events and conflicts.

In the context of the Ukrainian-Russian borderland, religion plays a role in the national identities formation, often acting as a barrier or, conversely, as a means of forming common features between different ethnic groups.

One of the key points is the following issue: how religious identity could affect the socio-cultural integration or disintegration in eastern Ukraine, in the Crimea, as well as in border regions where there is active religious competition? The above-mentioned issue raises important questions for the author about the role of religion in maintaining social stability and peaceful coexistence of different cultures and religions.

The chapter is extremely relevant in the context of current political and religious conflicts, particularly in eastern Ukraine and the Crimea, and stresses out the importance of religion as a

factor influencing interethnic and interreligious relations. Hence, the section is vital regarding the study on the Ukrainian-Russian conflict, since religion is indeed not only a personal but also a political factor in the creation of national and cultural identities. The author showed how religious affiliation could become an important tool for both strengthening and dividing society in the context of modern conflict.

The last chapter, “Local Communities of the Borderland: Challenges of Modernity,” covers how the long-standing conflict between Ukraine and Russia affects the formation and transformation of the local communities identity, and modern rethinking of the concept of the local in the context of globalization. Special emphasis is on the change in the self-identification of the population, its attitude towards state institutions and political narratives. “The problems that modern Ukraine faces in the formation and consolidation of the cultural and civilizational identity are largely caused by its geopolitical position... The regional local factor under such conditions becomes a factor that has a decisive influence on the “spatial” dimension of constructing the national history” (p. 273).

The objective conclusions (Afterword, pp. 309–320) that meet the objectives set in the research are impressive and reflect the scientific novelty of the monograph. The author Yaroslava Vermynych analyzed the genesis of territorial and identity confrontations on the Ukrainian-Russian borderland and examined the determinants of conflict in border societies associated with the social and mental deformations in Afterword. The analysis of the cultural and mental borders formation was carried out through the prism of the Ukrainian intellectual practices of constructing models of the regional identity, which had a powerful national impulse in the all-Russian historical discourse. The creation and implementation of the system of information and cultural security is considered as a possible resource for solving the issue on the identity conflict constructively, eliminating conflicts in Ukrainian society and reintegrating the residents of occupied territories.

The monograph is an independent, relevant, innovative study in its concept, which meets all modern requirements of the historical science. The presented historical, ethnographic, ethnic and administrative maps of Ukraine are considered to be a significant addition to the peer-reviewed monograph. The above-mentioned illustrates the processes of formation, transformation and interaction of identities on the Ukrainian-Russian border comprehensively, reflects the dynamics of the population ethnic composition in different periods of history, demonstrates cultural and ethnographic differences between all regions of Ukraine, and highlights regional features of the Ukrainian and Russian identity development.

It should be noted that a terminological dictionary would not be superfluous in such a scientific publication. The recommendation to add a terminological dictionary indicates a fervent desire to make the publication more accessible and understandable for readers, who may not be familiar with the terms related to this topic.

Hence, the monograph “The Ukrainian-Russian Borderland in the Space of Identity Conflict in History and Modernity” is an important and valuable contribution to the study of complex issues on the national identity, culture and history in the context of the modern Ukrainian-Russian conflict. It will be useful both for scholars and a wide range of readers interested in the issues of identity, nationalism and interstate relations, who are not indifferent to the history of their native land.

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NOTES

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