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**JEWELRY MADE FROM GOLD COINS IN THE MATERIAL CULTURE OF THE POPULATION OF THE NORTHERN BLACK SEA REGION, THE UKRAINIAN STEPPE, AND THE FOREST-STEPPE (4th century BC – early 3rd century AD)**

**Abstract.** *The purpose of the study is to do the research on the problem of the use of ancient coins as ornaments by the population of the Northern Black Sea region, the Ukrainian Steppe, and the Forest-Steppe in the 4th century BC – early 3rd century AD. Methodology.* In the course of the research, the authors employed a range of general scientific, historical, and numismatic methods. Particular attention was paid to the descriptive research method. That is, the authors sought to provide a detailed and accurate account of the numismatic artifacts of the 4th century BC – early 3rd century AD discovered

in the Northern Black Sea region, the Ukrainian Steppe, and the Forest-Steppe that “survived” the process of demonetization, i.e., the transformation of a coin from a means of payment into an ornament. **The scientific novelty:** For the first time, the article analyzes a series of gold ornaments made from coins as objects of jewelry art in unity with the numismatic artifacts that served as the basis for their production. The use of numismatic imagery from the coins of the Bosphoran Kingdom in the manufacture of gold plaques by Scythian craftsmen is also examined. **The Conclusions:** In the course of this study, the authors analyzed the finds from the Northern Black Sea region, the Ukrainian Steppe, and the Forest-Steppe of 30 coins dating from the 4th century BC – early 3rd century AD that were transformed into ornaments (amulets), as well as a number of gold plaques imitating the coins of Panticapaeum. Information about these finds is contained in diverse sources: museum websites, scholarly works, the “Coins of Bospor” catalogue-archive website, and metal-detecting forums. Part of the information regarding the finds of “demonetized” coins was obtained personally by the authors from local historians. Taken together, this evidence made it possible to form a comprehensive understanding of the use of gold coins and their imitations in the material culture of the population of the Northern Black Sea region, the Ukrainian Steppe, and the Forest-Steppe in the 4th century BC – early 3rd century AD.

**Key words:** non-monetary uses of coins, coins as amulets, Greek coin-set jewellery, gold plaques.

### ПРИКРАСИ ІЗ ЗОЛОТИХ МОНЕТ У МАТЕРІАЛЬНІЙ КУЛЬТУРІ НАСЕЛЕННЯ ПІВНІЧНОГО ПРИЧОРНОМОР'Я, УКРАЇНСЬКОГО СТЕПУ ТА ЛІСОСТЕПУ (4 ст. до Р.Х. – початок 3 ст. н.е.)

**Анотація. Мета дослідження** дослідити проблему використання населенням Північного Причорномор'я, Українського Степу та Лісостепу в 4 ст. до Р.Х. – на початку 3 ст. н.е. античних монет як прикрас. **Методологія дослідження.** У процесі проведення дослідження авторами було використано різку загальнонаукових, історичних та нумізматичних методів. Особлива увага приділена дескриптивному методу дослідження. Тобто автори намагалися надати детальний і точний звіт про відомі нам нумізматичні пам'ятки 4 ст. до Р.Х. – на початку 3 ст. н.е. знайдені на теренах Північного Причорномор'я, Українського Степу та Лісостепу і які “пережили” процес демонетизації, тобто перетворення із монети як засобу платежу на прикрасу. **Новизна дослідження** У статті вперше проаналізовано низку золотих прикрас з монет як пам'яток ювелірного мистецтва, в єдності з нумізматичними пам'ятками, що стали основою для їх виготовлення. Також з'ясовано використання нумізматичних сюжетів монет Боспорського Царства для виготовлення золотих бляшанок скіфськими майстрами. **Висновки.** Під час написання даної статті автори проаналізували знахідки в Північному Причорномор'ї, Українському Степу та Лісостепу 30 монет 4 ст. до Р.Х. – на початку 3 ст. н.е. які були перетворені на прикраси (амулету), та низку золотих бляшанок, імітуючи монети Пантікапея. Відомості про ці знахідки містяться у різнопланових джерелах: сайтах музеїв, працях дослідників, сайті “Coins of Bospor” catalogue-archive, форумах скарбошукачів. Частина інформації про знахідки “демонетизованих” монет автори отримали особисто від краєзнавців. Усе це в комплексі дало змогу сформулювати цілісне уявлення про використання золотих монет та їхніх імітацій у матеріальній культурі населення Північного Причорномор'я, Українського Степу та Лісостепу 4 ст. до Р.Х. – на початку 3 ст. н.е.

**Ключові слова:** немонетарне використання монет, монети як амулети, грецькі ювелірні вироби з монетами, золоті бляшки.

**Problem Statement.** The traditions of using coins as ornaments have been known for nearly two and a half millennia. The distinguished French scholar F. Lenormant noted that “we possess a large number of antique jewels of all kinds, chiefly necklaces and bracelets, in which gold coins of that time play a significant role. Nothing occurs more frequently than Roman gold medallions of the imperial period, fitted with a loop or set in turned and engraved mounts, often extremely refined, thus transforming them into pendants for necklaces” (Lenormant, 1878, p. 35). Finds of coin jewelry are known in Europe, the Levant,

and North Africa. Assistant Curator at the Art Institute of Chicago S. Caruso quite rightly points out that “in this context, coins were used predominantly as pendants but also in the creation of bracelets, belts, and rings” (Caruso, 2024).

From the time of their emergence-initially as coins struck in precious metals, notably electrum and gold-coins, at the discretion of their owners, underwent a process of “demonetization” and were transformed into ornaments, thereby losing their purely economic function.

Antique coins reached the highest degree of jeweler’s craftsmanship in Roman times: “the most elaborate of them inserted the coins – usually in gold – into pendants, rings, bracelets, brooches, belts, body-chains” (Perassi, 2021, p. 39). Nevertheless, the origins of the use of ancient coins for the production of ornaments date back to the second half of the 1st millennium BC.

**Review of Recent Literature.** Analyzing contemporary research on the problem of the use of coins of the 4th century BC – early 3rd century AD as ornaments, it should be noted that, with minor exceptions, this issue remains almost unexplored. One of the first scholars to address the transformation of coins into ornaments in antiquity was F. Lenormant, a distinguished French researcher whose scholarly interests included ancient numismatics. F. Lenormant pointed out that coins used as ornaments bore a perforation and that “anyone who has handled a sufficient number of ancient coins must have had the opportunity to observe specimens under such circumstances” (Lenormant, 1878, p. 35).

At present, however, virtually the only specialized study is the article by the eminent Italian scholar G. Gorini, published in 2017 in the proceedings of the international conference held in June 2009 on the island of Ios. This article is directly devoted to the issue of the use of ancient Greek coins as ornaments (Gorini, 2017). The scholar notes that the Greeks treated their own coins with great respect, and it is in this context that he sees the tradition of “the appreciation of Greek coins as ornament or jewels” (Gorini, 2017, p. 27). At the same time, the author rightly emphasizes that “this kind of reuse is not known in the archaic period and it is very rare in classical period owing to the scarcity of gold and silver on the Greek market. Furthermore, we can consider that gold and silver coins were put to uses unconnected with their original function and this happens when the coin loses its value” (Gorini, 2017, p. 27).

Among the corpus of finds of ancient Greek coins that underwent the process of “demonetization,” G. Gorini also mentions rings with staters of Panticapaeum discovered during archaeological excavations of the Great Ryzhanivka kurgan near the village of Ryzhanivka, Zvenyhorod district, Cherkasy region. These finds were examined in detail by the archaeologists S. Skoryy and J. Khokhorovski (Skoryy, & Khokhorovski, 2018).

Coins of the 5th – 4th centuries BC used as ornaments – “coins used as ornaments (pierced and suspended at the neck)” (Kakhidze, A., Iashvili, & Vickers, 2001, p. 283) – and discovered in burials on the Black Sea coast of southwestern Georgia are mentioned in the article by A. Kakhidze, I. Iashvili, and M. Vickers. However, these authors do not specifically investigate the use of coins as ornaments; rather, they merely record this fact and analyze the coins themselves, identifying their varieties and degrees of rarity. Nevertheless, the photographs presented in the article significantly expand our knowledge of this process of “demonetization”.

The use by the Scythians of gold decorative plaques based on motifs of ancient coins has been thoroughly studied by the Ukrainian archaeologists M. Daragan and S. Polin in their work “Golden jewellery of the Vodoslavka Scythian burial-ground of the second and third

quarters of the 4th century BC” (Daragan, & Polin, 2022). Certain information about ancient Greek coins used as ornaments and discovered in various regions of Ukraine is contained in the articles by V. Orlyk (Orlyk 2022; Orlyk, & Mekh, 2022; Orlyk, 2023; Orlyk, 2024).

At the same time, historiography lacks a comprehensive study of ornaments made from ancient coins within the material culture of the population of the Northern Black Sea region, the Ukrainian Steppe, and the Forest-Steppe in the 4th – 1st centuries BC, which underscores the relevance of the problem addressed in our article.

**Research Results.** Ornaments, regardless of whether they are items made by hand for personal use (or for use by close individuals) or products crafted by skilled artisans, constitute one of the components of material culture. Ornaments convey the aesthetic taste of their period. The authors fully support the view expressed by G. Gorini that the chronological framework for the transformation of coins into ornaments “is probably slightly later [than] the period of minting, respectively to the 4th and 3rd c. BC and in areas where or when the coins have lost their value” (Gorini, 2017, p. 27). Indeed, the practice of producing ornaments from coins that had gone out of monetary circulation, or had become obsolete and lost their nominal value, also occurred in subsequent historical periods (Orlyk, & Pavlenko, 2023).

The analysis of the finds known to the authors of ornaments made from gold ancient coins of the 4th century BC – early 3rd century AD from the territory of the Northern Black Sea region, the Ukrainian Steppe, and the Forest-Steppe makes it possible to systematize them according to their method of manufacture and intended use.

According to the method of manufacture: a) jewelry items, possibly produced by ancient craftsmen; b) primitive methods of demonetization by piercing the coin with a through-hole using improvised tools.

According to their intended use: a) ornaments for wearing on the finger; b) pendants; c) elements of clothing.

A separate category consists of ornaments made from impressions (appliqués) and imitations of coins.

Let us consider the ornaments made from gold ancient coins of the 4th century BC – early 3rd century AD known to the authors, discovered in the Northern Black Sea region, the Ukrainian Steppe, and the Forest-Steppe, in accordance with the proposed classification and taking into account the nature of the find: archaeological or accidental.

Gold coins used in jewelry intended for wearing on the fingers are rings “with bezels made from gold coins” (Berezova, 2001, p. 46). A gold stater of Panticapaeum was used as the bezel of these rings. On the obverse, it depicts the head of a bearded satyr wearing a wreath facing left; on the reverse, the legend ΠΑΝ and the image of a griffin holding a spear in its jaws facing left, with an ear of grain below.

Five specimens of such rings were discovered from the late 19th to the early 21st century during excavations of two kurgans in Zaporizhzhia and Cherkasy regions, as well as one find under unknown circumstances in the Autonomous Republic of Crimea. The first three specimens of such gold rings were discovered in the Great Ryzhanivka kurgan near the village of Ryzhanivka, Zvenyhorod district, Cherkasy region. Two rings were found during the excavations of 1887 (Fig. 2.1–2)<sup>1</sup>, and one during the excavations of 1995 (Fig. 2.3)<sup>2</sup>.

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<sup>1</sup> Photo: Agnieszka Susul, Archaeological Museum in Krakow.

<sup>2</sup> The authors express their gratitude to Doctor of Historical Sciences, Professor Serhii Skoryi, for granting permission to publish the photograph of the stater discovered during the 1995 expedition, reproduced from the monograph Skoryi & Khokhorovski 2018.

The fourth specimen of a ring, in which a gold Panticapaeum stater was also used as the bezel (Fig. 2.4), was discovered during the archaeological excavations of 1976 in kurgan “No. 9, burial 1, near the village of Mariivka, Zaporizhzhia region” (Berezova, 2001, p. 46).

The fifth specimen of a similar ring (Fig. 2.5), as noted above, was found in the Autonomous Republic of Crimea. This find is likely detector-based. Information and a photograph of this ring are available on the website Coins of the Bosphorus (Coin passport: 109-2075-81).

Thus, four out of the five specimens of gold rings with a gold Panticapaeum stater belong to the category of archaeological finds, while one specimen belongs to the category of accidental finds.

As for the dating of the minting of these staters, there is no unified opinion in numismatic scholarship. The researchers who studied four of the above-mentioned rings distinguish the staters used as bezels into several successive types struck in different chronological periods. In particular, it is believed that the first two rings discovered in 1887 in the Great Ryzhanivka kurgan used staters of the emission dated approximately to 330–315 BC, while the third ring, found in 1995, contained a stater of the emission dated approximately to 314–294 BC (Skoryy & Khokhorovski, 2018, p. 97). In the ring discovered in 1976 in a kurgan near the village of Mariivka, the bezel was made from a stater of the emission dated approximately to 310–304 BC (“A Ring with a Bezel from a Panticapaeum Coin”). The datings employed by these researchers were based on the chronology developed by D. Shelov (Shelov, 1956, p. 140) and supported by M. Mielczarek (Mielczarek, 1986, p. 102).

At the same time, according to V. Anokhin, the minting of these coins should be dated slightly later, within the chronological framework of 314–304 BC (Anokhin, 1986, p. 140–141). S. Skoryy and Y. Khokhorovski did not share a unified opinion regarding the periodization of these staters; one of the authors considered V. Anokhin’s chronology to be more realistic and attributed the staters to the emissions of 314–310 and 310–304 BC (Skoryy & Khokhorovski, 2018, p. 97). At the same time, in our view, the concept proposed by S. Polin appears to be more scientifically substantiated, according to which the minting of gold staters in Panticapaeum was completed in the third quarter of the 4th century BC (Polin, 2009, p. 226).

All four rings could have been produced either by ancient Greek or by Scythian craftsmen, as evidenced by the relatively simple manufacturing technique. Gold staters of Panticapaeum depicting the head of a satyr on the obverse and, on the reverse (which served as the inner side of the ring), a griffin holding a spear in its jaws, were used as bezels. To the bezels of three specimens – two from the Great Ryzhanivka kurgan and one from the kurgan near the village of Mariivka—two flat gold strips (hoops) were attached on both sides of the inner surface; their ends were sharpened and overlapped one another. Thus, these rings were adjustable in size. This may indicate the mass production of such rings, since the size could be adjusted independently depending on the thickness of the finger on which the ring was worn.

The two other known rings had solid, monolithic hoops. In all cases, the hoops (shanks) were attached to the edges of the coins by soldering. Two rings from the Great Ryzhanivka kurgan bear traces of repair, specifically the re-soldering of the hoop to the coin. S. Skoryy and Y. Khokhorovski quite rightly note that “the rough quality of the secondary soldering of the loops may indicate that the repair was executed rather unskillfully, probably within a Scythian environment” (Skoryy & Khokhorovski, 2018, p. 97).

Gold coins were also used as pendants and possibly as elements of clothing ornaments. Some of the specimens known to the authors have a soldered loop and were used as pendants.

Among these is a gold stater of Asander (46–21 BC), minted in Panticapaeum (Fig. 2.6). On the obverse, the coin depicts the head of Asander wearing a diadem, facing right; on the reverse, the legend ΒΑΣΙΛΕΩΣ ΑΣΑΝΔΡΟΥ ΒΟΣΠΙΟΡΟΥ and the image of an attacking horseman with a spear, facing right (Coin: 000-4770).

A stater of Cotys II of the emission of AD 131–132 (Fig. 2.7) also bears a special attachment for use as a pendant. On the obverse, there is a bust of the king facing right, surrounded by the legend ΒΑΣΙΛΕΩC ΚΟΤΥΟC. On the reverse, a bust of Hadrian facing right and the date ΗΚΥ (year 428 of the Bosporean era) are depicted (Coin passport: 478-4349-7). Unfortunately, there is no information not only about the archaeological context of these finds, but even about the specific place or region of their discovery.

All other gold coins known to the authors that were used as ornaments underwent a primitive process of “demonetization” through drilling (piercing) a hole in them. These include 23 specimens of gold staters dating from the second half of the 1st century BC to the early 3rd century AD. In particular, five specimens of Panticapaeum staters of Asander are known: 44–43 BC (7th year of reign), 43–42 BC (8th year of reign), 37–36 BC (14th year of reign), 35–34 BC (16th year of reign), and 28–27 BC (23rd year of reign). On the obverse of these coins is depicted the head of Asander in a diadem, facing right; on the reverse, the legend ΒΑΣΙΛΕΩΣ ΑΣΑΝΔΡΟΥ and the image of Nike with a wreath and a branch to the left (Fig. 2.8–2.12) (Coin passport: 230-4347-3; Coin passport: 000-4525-3; Coin passport: 234-4653-2; Coin passport: 235-4343-4; Coin passport: 241-4705-5).

Of the five aforementioned specimens, only one coin (Fig. 2.9) has an established archaeological context. It was discovered during the archaeological excavations of 2006 at the Late Scythian settlement of Kara-Tobe (village of Pryberezhne, Yevpatoria district, Autonomous Republic of Crimea) (Coin passport: 000-4525-3).

A gold Panticapaeum stater of the emission of 21–20 BC was also used as an ornament. On its obverse is depicted the head of Queen Dynamis wearing a diadem, facing right, while the reverse bears the legend ΒΑΣΙΛΙΣΣΗΣ ΔΥΝΑΜΕΩΣ, along with a star and crescent; to the right, ΖΩΣ (year 277 of the Bosporean era). This coin has a perforation (Fig. 2.13). It was found at the Gurzuf Saddle pass, Autonomous Republic of Crimea, Ukraine. At present, the coin is held in the Russian-occupied Yalta Historical and Literary Museum, Zolota Komora (“Golden Chamber”). Detailed information about this coin is available on the website Coins of the Bosporus (Coin: 253-5240).

A stater also belonging to the emission of Dynamis, but from the period of her second reign, was likewise “demonetized” in the same primitive manner by piercing a hole (Fig. 2.14). On the obverse of this coin appears a portrait of Augustus facing left; on the reverse, a head of Agrippa facing right, with the monogram ΔΥΜ to the left of the portrait and, below, the letter T (year 300 of the Bosporean era, corresponding to AD 3–4) (Coin: 267-5265).

As for other gold Panticapaeum staters of the 1st – early 3rd centuries AD that underwent a similar primitive process of demonetization, these include two specimens of staters of Aspurgus from the time of his first reign (Coin passport: 288-4947-2; Coin passport: 311-4241-1). On the obverse of the first coin (Fig. 2.15) is depicted the head of Augustus facing left, and on the reverse the head of Agrippa facing right, with a monogram to the left and, below the portrait, year 307 of the Bosporean era (AD 10–11). On the obverse of the second coin (Fig. 2.16) appears the head of Tiberius facing right, and on the reverse the head of Agrippa facing right, with a monogram to the left of the portrait and, below, year 328 of the Bosporean era (AD 31–32).

One specimen of a Panticapaeum stater of Cotys I (Fig. 2.17) has on the obverse the head of Claudius facing right, and on the reverse the head of Britannicus facing right, with the monogram BAK on the left and, below, year BMT (342 of the Bosporan era – AD 45–46) (Coin passport: 332-4767-3).

Two specimens of Panticapaeum staters of Sauromates I (Fig. 2.18–2.19) are also known. On the obverse of the first appears a portrait of the king facing right with the surrounding legend BACIAEΩC CAYPOMATOY; on the reverse, a bust of Domitian facing right, with AqT below (year 391 of the Bosporan era – AD 94–95) (Coin: 000-4665). On the obverse of the second stater of Sauromates I is a bust of the king facing left with the legend IOYAIΩY BACIAEΩC CAYPOMATOY around; on the reverse, a head of Trajan facing right, with Y below (year 400 of the Bosporan era – AD 103–104) (Coin: 394-4733).

Five specimens of Panticapaeum staters of Eupator of various years complete another subgroup (Fig. 2.20–2.24). On the obverse of these coins is depicted the head of the king facing right with the legend BACIAEΩC EYIIATOPOC around. On the reverse are busts of Marcus Aurelius and Lucius Verus, beneath which the year is indicated (year 458 of the Bosporan era – AD 161–162; 459 – AD 162–163; 460 – AD 163–164; 461 – AD 164–165; and 463 – AD 166–167) (Coin: 537-4300; Coin passport: 538-4251-11; Coin passport: 539-4234-3; Coin passport: 540-4254-9; Coin passport: 542-5166-1).

The group of “demonetized” Panticapaeum gold coins known to the authors concludes with six specimens of staters of Sauromates II (Fig. 2.25–2.30). One specimen bears on the obverse a bust of the king facing right with the surrounding legend BACIAEΩC CAYPOMATOY, and on the reverse a bust of Commodus facing right, with ζΠΥ below (year 486 of the Bosporan era – AD 189–190) (Coin passport: 567-4693-31).

The second and third specimens have a similar obverse (with some additional elements and variations in the spelling of the king’s name CAYPOMATOY), but on the reverse is depicted a bust of Septimius Severus facing right, with the year qY (490 of the Bosporan era – AD 193–194) (Coin passport: 567-4693-31) and AqY (491 of the Bosporan era – AD 194–195) (Coin passport: 572-4314-7).

The remaining three staters of Sauromates II have an almost identical obverse with the king’s bust facing right (differing only in minor additional elements), while on the reverse are depicted busts of Septimius Severus and Caracalla, with corresponding minting years: EqY (495 of the Bosporan era – AD 198–199) (Coin passport: 576-4308-6), ΦEqY (500 of the Bosporan era – AD 203–204) (Coin passport: 580-4457-17), and BΦ (502 of the Bosporan era – AD 205–206) (Coin passport: 582-4435-2).

All these coins are accidental finds lacking archaeological context; for some of them, the places of discovery are indicated and may be considered conditionally reliable. Thus, the website *Coins of the Bosporus* states that the coin (Fig. 2.21) was found in the outskirts of Vinnytsia (Coin passport: 538-4251-11); the coin (Fig. 2.23) was discovered in the territory of the former Tyvriv district, Vinnytsia region (Coin passport: 540-4254-9); and the coin (Fig. 2.28) was found in the territory of the former Polonne district of Khmelnytskyi region (Coin passport: 576-4308-6).

As can be seen, five specimens of “demonetized” gold Panticapaeum staters were minted in the 4th century BC, eight specimens in the 1st century BC, five specimens in the 1st century AD, ten specimens in the 2nd century AD, and two specimens in the early 3rd century AD.

With regard to gold ornaments made from imitations of ancient Greek coins or from impressions (appliqués) of original coins on gold plaques, it should be noted that this

represents “a quite particular kind of the archaeological material, which takes intermediate position between ancient Greco-Roman coins and jewellery” (Kovalenko, 2017, p. 113). F. Lenormant emphasized that for the manufacture of ornaments, not original coins but rather imitations of imaginary coins or coins long withdrawn from circulation were quite often used. The French scholar provides the example of a bracelet he purchased in Greece in 1866: “this bracelet did not date from an earlier period than the Roman Imperial era, and it was composed of imitations of hectae (or one-sixth staters) in electrum from Mytilene, similar to those struck on that island between the Peloponnesian War and the reign of Alexander the Great. The pieces that had been copied were therefore coins that had gone out of circulation five or six centuries earlier – genuine medals worthy of antiquarian collections. The craftsman, moreover, had not taken care either to give all the pieces exactly the same weight or to reproduce with any precision the weight of the ancient coins, imitating only their external appearance. Furthermore, instead of striking them, as in the case of the original Mytilenean hectae and, in general, all ancient coins, he had cast them” (Lenormant, 1878, p. 35).

Finds of gold appliqués of ancient coins are quite widespread in the Northern Black Sea region, particularly in burials excavated at Panticapaeum, Chersonesus, and Olbia. For instance, in the well-known Kul-Oba kurgan near Kerch, gold plaques were discovered in 1830 that “are stamped on coins from Panticapaeum, Athens, and other Greek cities, and along their circumference one can see the holes through which the threads that attached them to the fabric once passed” (Lenormant, 1878, p. 39).

The British scholar F. H. Marshall, in the Catalogue of the Jewellery preserved in the British Museum, also refers to such finds from Olbia. For example: “Gold bracteate disk, imitating a coin of the Bosporan King Eumelos. It is stamped with a winged caduceus within a circle of dots. In the field, Z. From a tomb at Olbia on the Black Sea. Acquired, 1907. Diam., 2 cm.; wt., 5 grns. From a coin of King Eumelos struck in 304 B.C.” (Marshall, 1911, p. 367, #3072).

M. Rostovtsev emphasized the finds of gold plaques that “more or less crudely reproduce the same type of Panticapaeum coins that we also find in the Ryzhanivka kurgan” (Rostovtsev, 1925, p. 443). D. Shelov likewise pointed to the presence in Scythian burials of “gold plaques which reproduce the types of Panticapaeum staters” (Shelov, 1956, p. 140), particularly in the kurgans of Oguz and Diiv (Henichesk district, Kherson region), Verkhonii Rohachyk (Kakhovka district, Kherson region), the First and Second Mordvinivskiyi (Kakhovka district, Kherson region), Chortomlyk (Nikopol district, Dnipropetrovsk region), and Oleksandropol (Dnipro district, Dnipropetrovsk region). As Rostovtsev quite rightly noted, the matrices for such plaques were not original gold coins but their imitations (Rostovtsev, 1925, p. 445). In general, according to Rostovtsev, a number of gold plaques found in Scythian kurgans of the Northern Black Sea region imitated not only coins of Panticapaeum but also those of Athens, Heraclea, Cyzicus, Syracuse, Tarentum, and other ancient Greek minting centers (Rostovtsev, 1925, pp. 443–449).

The most detailed analysis of gold plaques produced after the motifs of ancient coins, particularly Panticapaeum staters with a satyr and griffin, was conducted by M. Daragan and S. Polin. The Ukrainian archaeologists not only provided a thorough description of the finds of gold plaques from the Scythian burial-ground of the second and third quarters of the 4th century BC, but also published high-quality photographs of these ornaments (Daragan, & Polin, 2022, pp. 73–75).

Regarding Rostovtsev’s assumption that gold plaques from Scythian kurgans imitated coins of various ancient Greek minting centers, M. Daragan and S. Polin indicate that only

“two small series of plaques have been reliably demonstrated to be imitations of Panticapaeum staters and Philip II of Macedon tetradrachms respectively” (Daragan, & Polin, 2022, p. 72). The gold plaques carefully examined and systematized by these scholars indeed allow these two groups of imitations to be unequivocally distinguished (Fig. 1).



**Fig. 1. Gold appliqués imitating staters of Panticapaeum and tetradrachms of Philip II of Macedon (not to scale)<sup>3\*</sup>**

At the same time, the visual analysis conducted by the authors of this article of other published gold plaques of the Scythian period has revealed the presence of gold appliqués depicting a Gorgoneion facing with open mouth, discovered in the city of Nizhyn, Chernihiv region (Gladkyy, 2018, pp. 312–313). These are close in iconography to the didrachm of Athens of the “Wappenmünzen” type, circa 520 BC (Attica, Athens, Didrachm), as well as to the silver hemistater of Macedon, Neapolis, circa 500–480 BC. However, it is impossible to state unequivocally that these specific coins served as prototypes for imitation, since, unfortunately, the archaeological context of this find is unknown to us.

It should also be noted that the widespread use of the griffin image in the production of gold plaques was characteristic of both Scythian culture and the Greek world, due to processes of cultural interaction and mutual influence. For example, during excavations of a Greek burial in Olbia, a plaque depicting a griffin was discovered (Buyskykh, Denysova, & Yvchenko, 2016, p. 71).

Such items were produced through a relatively simple manufacturing process, in which coins or their imitations were used as matrices. They were first covered with foil, over which a lead plate was placed. The image was then struck using a wooden hammer. After this operation was completed, the impression of the coin on the gold foil was cut out according to the size of the original coin. S. Kovalenko quite rightly notes that “the simple mechanical process of manufacturing the appliqués, as well as their discovery in the various sorts of tombs, shows that they fulfilled the needs of wide circles of the ancient population of the northern Black Sea littoral” (Kovalenko, 2017, p. 114). F. Lenormant stated that ancient coin-shaped appliqués “were used by sewing them, like sequins, onto very sumptuous garments, at least among Asians and semi-Hellenized barbarians” (Lenormant, 1878, p. 35).

**Conclusions.** The Ukrainian archaeologist M. Braichevskyi noted that the use of coins as

<sup>3\*</sup> The authors express their sincere gratitude to Dr. S. Polin for providing us with the photographs and for granting permission to use them in our publications.

ornaments is a characteristic feature of a society in which a relatively developed commodity-money economy has already been formed. In his view, in order for “a coin in a given society to be used as an ornament, it must first exist there in its direct monetary function, as a means of commodity circulation” (Braichevskyi, 1959, p. 31).

Modern scholarship does not offer a unified opinion regarding the primary causes of the transformation of coins into ornaments. G. Gorini suggests that it is quite possible that the function of such transformations “is above all more paramonetary, as talisman... or somebody thought they have healing powers, to preserve from the illnesses: ἀλεξίκακος, φυλακτικός” (Gorini, 2017, p. 27). Notably, the Italian scholar had already emphasized this function of coin transformation into ornaments in his earlier publications (Gorini, 1978; Gorini, 1993).

At the same time, the analysis conducted by the authors of ornaments made from ancient coins of the 4th century BC – early 3rd century AD discovered in the territory of the Ukrainian Steppe and Forest-Steppe demonstrates that coins subjected to jeweler’s processing (Figs. 1–7) were incorporated into jewelry items with consideration of the obverse imagery. Conversely, in the majority of coins that underwent a more primitive process of “demonetization” through piercing (drilling) holes, the iconographic composition was not taken into account. This may indicate the absence of an aesthetic purpose in such acts of “demonetization.”

Among the coins transformed into ornaments or protective amulets (talisman), whose finds have been recorded in the territory of the Ukrainian Steppe and Forest-Steppe and in adjacent regions, there are specimens from the entire chronological span under study: five rings, two amulets, and twenty-three coins with primitive perforations. In addition, a series of gold plaques that may have imitated coins in jewelry and decorative applications has been analyzed.

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Fig. 2.



Fig. 2 (continued)

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**MARRIAGE AND ITS LEGALITY THROUGH THE PRISM OF CANONICAL  
NORMS AND EVERYDAY PRACTICE (BASED ON MATERIALS FROM  
SECULAR AND CHURCH COURTS OF PRZEMYŚL LAND  
OF THE 17th – 18th CENTURIES)**

**Abstract.** *The purpose of the research is to characterize the procedure for concluding marriages and determine the legal boundaries of its legitimacy in the Ukrainian society of the early modern period using the example of Przemyśl land of the Ruthenian Voivodeship in the 17th – 18th centuries. The methodology of the research is based on the principles of historicism, authorial objectivity, scientific verification of historical sources, and the use of general (analysis, synthesis, typology, classification)*

and special (historical-genetic, historical-systemic, historical-typological) scientific methods. **The scientific novelty** consists in the fact that there has been carried out a comprehensive analysis on the procedure for concluding a marriage based on the factual material of Przemysl land territory (Western Ukrainian lands); the legal foundations of its existence have been clarified through the prism of law and everyday practices. **Conclusions.** The family creation had established forms and procedures in the territory of the Ruthenian Voivodeship (Western Ukrainian lands nowadays) in the 16th – 18th centuries. The marriage was concluded with the consent of both parties and participation of a wider circle of the family, and not only on the initiative of a groom and a bride. The procedure began with engagement – a preliminary consent of both parties to get married. The engagement was followed by marriage, the result of which was the conclusion of a marriage contract. According to the preserved texts on marriage contracts of the 16th – 18th centuries, material issues were the subject of marriage contracts primarily. In the 16th – 18th centuries, when marriage was concluded, there were taken into account social and public realities of the time and they provided for numerous restrictions and prohibitions, the violation of which caused legal conflicts and served as a basis for marriage annulment. The documents of the 17th – 18th centuries provide a rich factual material. There were several aspects, which became the subject of legal proceedings and ultimately they led to marriage annulment, for example, violation of social norms, age restrictions, failure to comply with material obligations of marriage contracts, close blood relationship, different religious affiliation, etc.

**Key words:** marriage contracts, creation of a family, history of family law, mediation, Przemysl Land.

### УКЛАДЕННЯ ШЛЮБІВ І ЇХНЯ ПРАВОЧИННІСТЬ ЧЕРЕЗ ПРИЗМУ КАНОНІЧНИХ НОРМ ТА ПОВСЯКДЕННОЇ ПРАКТИКИ (ЗА МАТЕРІАЛАМИ СВІТСЬКИХ І ЦЕРКОВНИХ СУДІВ ПЕРЕМИШЛЬСЬКОЇ ЗЕМЛІ XVII – XVIII ст.)

**Анотація. Мета дослідження** – всебічно охарактеризувати процедуру укладення шлюбів та визначити правові межі його легітимності в українському суспільстві ранньомодерного часу на прикладі Перемишльської землі Руського воєводства у XVII – XVIII ст. **Методологія дослідження** базується на засадах історизму, авторської об'єктивності, наукової верифікації історичних джерел та використання загальних (аналіз, синтез, типологізація, класифікація) і спеціальних (історико-генетичний, історико-системний, історико-типологічний) наукових методів. **Наукова новизна:** здійснений всебічний аналіз процедури укладення шлюбу на фактологічному матеріалі з теренів Перемишльської землі (західноукраїнські землі). з'ясовано правові засади його існування через призму права та повсякденних практик. **Висновки.** Шлюб укладався за згодою обох сторін та за участі ширшого кола сім'ї, а не тільки з ініціативи нареченого і нареченої. Процедура розпочиналася із заручин – попередньої згоди обох сторін на шлюб. Далі йшли зашлюбини, результатом яких було укладення шлюбного договору. Тексти збережених шлюбних угод XVII – XVIII ст. засвідчують, що предметом зашлюбин були насамперед матеріальні питання. Шлюб у XVII – XVIII ст. укладався із врахуванням тогочасних соціальних та суспільних реалій й передбачав низку обмежень і заборон, порушення яких спричиняло правові колізії й слугувало підставою для уневажнення шлюбу. Документи XVII – XVIII ст. засвідчують це багатим фактологічним матеріалом. Порушення станових норм, вікових обмежень, недотримання матеріальних зобов'язань шлюбних угод, близька кровна спорідненість, різна кофесійна приналежність тощо часто ставали предметом судових розглядів та зрештою могли спричинити уневажнення шлюбу.

**Ключові слова:** шлюбні угоди, створення сім'ї, історія сімейного права. Перемишльська земля.

**Problem Statement.** During the Middle Ages and the Modern Age, in Europe the institution of marriage was formed on the basis of diverse historical traditions. The ancient heritage, barbaric accretions, and church guidelines could be found among the above-mentioned historical traditions. The latter was considered to be the foundations for legal functioning of marriage. By the end of the late Middle Ages, the main parameters of

marriage – the procedure for concluding it, material aspects of its functioning, the system of prohibitions and restrictions, the nullification of marriage, etc. – had finally crystallized. To a large extent, they are observed in the majority of European countries to this day. Ukraine is no exception to this rule. The Ukrainian society has its own long tradition of creating and legitimizing the family legally, which dates back to the 16th – 18th centuries. It is crucial to study the above-mentioned issue in order to better understand the process regarding how family law evolved.

**Review of Recent Research.** The Polish legal historians studied the history of family law and in particular family creation at the beginning of the 20th century, as well as other scholars, as the issue has a long research tradition. In particular, Przemysław Dąbkowski was the first one, who tried to systematize information about the institution of marriage in the Middle Ages and Modern times in his two-volume research on the history of the Polish law (Dąbkowski, 1910, pp. 333–448). Unfortunately, the Polish historical science did not address this issue in the Soviet times. At the beginning of the 21st century, the studies on the history of marriage and family were resumed. There emerged numerous studies on this issue over the past two decades. wrote about this in detail. Such scholars covered the above-mentioned issue: K. Sulej (Sulej, 2001), Ja. Kuchta (Kuchta, 2007), M. Lubczyński (Lubczyński, 2001), U. Kicińska (Kicińska, 2013). A. Penkała-Jastrzębska studied this issue comprehensively and quite fruitfully (Penkała, 2016; Penkała-Jastrzębska, 2020; Penkała-Jastrzębska, 2022; Penkała-Jastrzębska, 2023; Penkała-Jastrzębska, 2025). Obviously, if we are talking about the Polish historiography, it should be stated that the above-mentioned studies were based on the factual material from the territories of modern Poland (*in Polish* – Małopolska, Mazowsze, Wielkopolska). It does not diminish their scientific significance, because their conclusions are adequate and relevant in most cases. However, they cannot replace the corresponding studies on the history of marriage in Western Ukrainian society of the 16th – 18th centuries completely. I. Voronchuk (Voronchuk, 2006) and N. Starchenko (Starchenko, 1999; Starchenko, 2001) wrote about the institution of marriage among the Ukrainian historians. However, their studies dealt with the Ukrainian lands within the Grand Duchy of Lithuania, which used its own legislation and even after the Union of Lublin, the Second Lithuanian Statute continued to operate in the territories of Volhynia and Kyiv region. Some financial and property aspects of marriages among the Ukrainian nobility are revealed in the works of I. Smutok (Smutok, 2006; Smutok, 2017; Smutok, Ilnytskyi, & Haliv, 2024), Ya. Lyseyko (Lyseyko, Haliv, & Ilnytskyi, 2025), and others.

**The purpose of the research** is to characterize the procedure for concluding marriages and determine the legal boundaries of its legitimacy in the Ukrainian society of the early modern period using the example of Przemyśl land of the Ruthenian Voivodeship in the 17th – 18th centuries.

**Research Results.** In the Old Polish-Lithuanian Commonwealth the institution of marriage had established forms in the late Middle Ages, which remained unchanged in the 17th and 18th centuries. They were based on the procedures and regulations regulated by the church law in the field of the marital cohabitation and secular law in the field of property relations between spouses.

Marriage began with an engagement – a potential agreement to enter into marriage. Such preliminary agreements could arise between the families, parents, guardians and close relatives of the bride and groom. In most cases, they were oral. Their time frame was not limited and could be concluded when a potential husband and wife were still children. Engagements

were not mandatory and could be annulled without any legal consequences. However, this circumstance did not always prevent the offended party from seeking satisfaction in court. The subject of the legal proceedings in such cases could be certain things that the parties exchanged as evidence of agreements. Hence, in 1638, Mykolai Ilnytsky sued Marianna Turianska, demanding the return of the ring and scarf that he had given to her during the engagement (CSHAUL, f. 13, d. 1, c. 297, p. 370).

The next stage of marriage was called a betrothal. Its essence was the conclusion of a marriage contract. Several dozens of such contracts with the participation of local nobility were preserved in Przemyśl Grodsky acts. Hence, we can remodel the content and course of a betrothal.

A betrothal was concluded with the participation of two parties – the representatives of a groom and, similarly, the representatives of a bride, the same parties as during engagement. A groom himself could act as a party to the agreement, since he disposed of his movable and immovable property independently. These could be also his parents, provided that a son had not yet received a share of his inheritance from his father. On a bride's side, in all cases without exception, these were her parents, guardians and close family. The family involvement often gave rise to the situations in which marriages were concluded without the consent of the young. It concerned not only a bride, but also a groom. For example, a nobleman Toma Matkivsky testified in 1702 in Przemyśl Episcopal Court that he was forced to marry under pressure of his mother and her brothers (SAP AGCB, c. 2, p. 376).

According to the content of agreement, it was designed to regulate the property aspects of marriage. Taking into consideration the practice of that time, the bride received a certain share (movable or immovable property) from her father's and mother's inheritance, the so-called dowry. The above-mentioned material security was transferred to a husband. A husband, for his part, added to it an equivalent amount in monetary terms and recorded all this in his estate. All this was done in order to protect a wife from material losses. After all, according to the law, in the event of a husband's death or under other circumstances, she could not be evicted from her husband's house and estate until she received the amount recorded by her husband (Dąbkowski, 1910, pp. 387–402; Penkała, 2016).

The size and components of the dowry could vary. A wealthier nobility gave their daughters several or even several thousands of zloty. In 1708, Bazyli Ustrzycki promised his daughter Kateryna a dowry of 15 thousand zloty in cash and 5 thousand in movable property (w kleynotach) (1708) (CSHAUL, f. 13, d. 1, c. 504, p. 3487); Ludovica Romer, before her daughter's marriage Helena to Heorhiy Naguyovskyi in 1740, undertook to pay a thousand thalers, which at the then exchange rate was 20 thousand zloty (CSHAUL, f. 13, d. 1, c. 553, p. 1643); Anna Hulianicka gave 3,000 zloty to her daughter Marianna, of which 2,000 were paid in cash, and the rest – “in jewels, pearls and other possessions” (1678) (CSHAUL, f. 13, d. 1, c. 489, p. 922)

Less wealthy nobility gave their daughters a dowry of several hundred zloty, before that – a pair or two oxen, the same number of cows and one or two horses; various household utensils. It was exactly the dowry prescribed by the Turecki couple for their daughter Kateryna (200 zloty in cash, 200 zloty in promissory note, a pair of oxen, two cows, a stallion) in 1700 (CSHAUL, f. 13, d. 1, c. 471, p. 1959), the Pażewicz couple daughter's Marianna dowry was the following: 200 zloty, 4 oxen, 4 cows, 1 horse, 1 beehive in 1724 (CSHAUL, f. 13, d. 1, c. 530, p. 2530); the Bandriwski couple daughter's Oleksandra dowry was 400 zloty, 4 oxen, 4 cows, 2 horses in 1728 (CSHAUL, f. 13, d. 1, c. 541, p. 295); the Kulczycki-Smetanka

couple daughter's Anastasia dowry was 400 zloty in cash, 100 zloty for the purchase of oxen, 2 young oxen, 3 cows and a heifer and "ochedostwo szlacheckie" in 1780 (CSHAUL, f. 13, d. 1, c. 651, p. 192).

There could be seen deviations from this standard and other methods, forms of dowry payment in some agreements. The Popeli-Czarnokożyczi, before their daughter's Anna marriage to Pawel Bachyński undertook to give his future son-in-law 6 plots of arable land in the village of Bereźnica, which were valued at 400 zloty, instead of a monetary sum in 1669 (CSHAUL, f. 13, d. 1, c. 454, p. 1031). Another case, Kostiantyn Telesznycki and his sons promised to pay 2000 zloty as a dowry for their daughter Susanna, but not in money, but by allocating a land plot from their estate in the village of Nowoszydzi in 1693 (CSHAUL, f. 13, d. 1, c. 462, pp. 786–787). The Matkiwski Budzowyczi brothers gave their sister Anna a pair of oxen, a pair of cows, a heifer and allocated a quarter of their estate of arable land in the village of Matkiw (CSHAUL, f. 13, d. 1, c. 491, p. 67).

Marriage contracts specified in detail when and under what circumstances a bride's party was obliged to transfer the dowry (cash and movable property). Having received the dowry, a groom undertook immediately, together with an equivalent amount, to register it on his estates (usually half of all property). This procedure was formalized by a special document, which was entered into the acts of the local town or Zemstvo courts and was called a "reformatio". A bride, in turn, undertook to renounce her rights to her father's and mother's estates. This action was also recorded by a special act in the Grodsky or Zemstvo courts, and is known as *abrenuntiatio* (Lubczyński, 2001 p. 141; Głuszak, 2019).

Such measures were quite justified. After all, it was about material values, and both parties tried to protect themselves as much as possible from various surprises and force majeure situations. According to the court cases, related to the payment of dowries and the material support of the newly created family, even such reservations could not completely eliminate misunderstandings, and documents of the 17th and 18th centuries are full of records (protests, demonstrations, complaints, etc.) about non-compliance with marriage agreements in terms of dowries payment. As it turned out from these lawsuits, despite promises to pay the money as quickly as possible and give the movable property promised to a bride, a bride's family often did not comply with these conditions. Non-payments dragged on for years, and sometimes for several dozens of years. For example, a peasant from the village of Ozymyn, Sambir Starostwo, sued the Pruski brothers in 1702, accusing them of not paying him 100 zloty of dowry, which the Pruski brothers' late father had promised him 9 years earlier (SAP AGCB, c. 2, p. 372).

The agreement often included a separate clause warning against its non-compliance. In such a case, the parties stipulated a certain monetary deposit, which was paid by a violator of the agreement to an aggrieved party. For example, the marriage contract between Franciszek Didynski and Theresia Ciebrówka in 1672 provided for such a deposit in the amount of 1,400 zloty (CSHAUL, f. 13, d. 1, c. 408, p. 2520.), the contract of Remigian Baczyński and Susanna Teleszczyńska – 2,000 zloty (1693) (CSHAUL, f. 13, d. 1, c. 462, p. 787), the agreement of Stanisław Kolakowski and Franciszek Agnieszka Terlecka – 6,000 zloty (1705) (CSHAUL, f. 13, d. 1, c. 480, p. 962).

The church and secular law was designed to regulate family relations, and in particular the creation of a family, provided for a number of restrictions and prohibitions on marriage. They were not immutable and in the 17th and 18th centuries, could either weaken or, conversely, strengthen.

One of the factors that influenced the marriage policy was the class differentiation of society of that time. Diverse social groups had different rights and obligations that limited inter-class contacts, including marriage. There was no direct ban on creating families between people of different social origins. However, there were indirect restrictions that made such marriages difficult. Hence, a noblewoman, having married a peasant or a burgher, became a member not only of a peasant family, but also of a rural or urban community and took on all the corresponding obligations: paying taxes, working off serfdom, etc. A noblewoman also lost protection from Zemstvo law and was the subject to jurisdiction of the private nobility or the king, depending on who her husband was – a royal or private noble peasant-subject or a burgher. Despite this, inter-class marriages arose throughout the existence of the Old Polish-Lithuanian Commonwealth. It was well illustrated by the examples from the history and genealogy of the petty nobility of Przemyśl land. In general, the percentage of such marriages was about 8-9%. These marriages were more common in pairs of non-noblemen – noblewomen (13%), while in pairs of noblemen – non-noblewomen it occurs less often (4%). The nobility was equally related to the townspeople, priests, viyty, millers, innkeepers, peasants from royal and noble villages (Smutok, 2006).

The uneven position of diverse social classes and groups, and in some cases the subordination of some to others, also affected marriage policy. In particular, peasant subjects could not marry without the consent of their owners. It is difficult to say how far this right of lords extended over their subjects. The sources of that time do not record any reliable examples. According to the Sejm resolution of 1511, the peasant daughters were given freedom to marry without any consent of their lord (Volumina Legum, I, 379). However, the relics of such restrictions continued to operate later. In particular, a peasant woman could not marry a peasant from another village belonging to another lord without any consent of her lord. The transition from one jurisdiction to another involved the payment of a certain monetary compensation. In contemporary documents, it is called “kunica”, “virginal” (*in Polish* – kunica, pojemszczyzna, conagium, nuptiale, virginal).

Descriptions of the royal estates of the Ruthenian Voivodeship in the 1560s were full of references to such payments. The amount of such payment was 12 groszy from a girl and 30 groszy from a widow. It was higher and amounted to 2 zloty or a bunch of groszy per girl in some places. It was provided that marriage was concluded with a peasant from another estate. If such a marriage was concluded with a peasant from a neighbouring village of the same royal estate, the payment was lower and amounted to 6 groszy (Hruszevskij, 1895, p. 35, 47, 55, 56 etc). According to the fines and payments registers of Sambir economy villages, “kunicie” paid 2 zloty in the middle of the 17th century (NB LNU, VRSRK, c. 514/III, pp. 24, 27, 31, 32, 35 etc).

Marriage was also performed taking into account a religious factor. The above-mentioned issue was especially relevant in the territories of the Ukrainian lands as part of the Old Polish-Lithuanian Commonwealth, where the Catholic and Orthodox worlds intersected. The Catholic Church consistently defended the right to limit kinship relations between the representatives of other Christian denominations in every possible way. Hence, the change of religion of one of the parties from the Orthodox to Roman Catholic was considered to be a necessary condition for marriage in the late Middle Ages in the 15th – 16th centuries. The history of noble families, who formed the elite of the Rus' Voivodeship and traced their roots from the boyar families of the Galician Rus, showed that this approach was practised actively. The rebaptism of the Ruthenians (*rebaptizatio ruthenorum*) was attested by the

documents from the 15th century. For example, there was a direct indication of the need for rebaptism in the marriage contract of 1441 between Freder of Pleszowycz and the Bybelski on the marriage of Senek of Bybelski to Jadwiga, Freder's daughter (Zazulak, 2012).

However, in the 17th and 18th centuries, such re-baptism was not practised. Interfaith marriages arose, especially actively in the bourgeois and gentry environment. They were not very common. For example, among the Ruthenian gentry of Przemyśl land, their share was very low and fluctuated within a few percent. The history of such families showed that each party to marriage could remain in their faith (Smutok, 2017, pp. 65–67).

Both parties were required to have the appropriate physiological ability in order to get married. After all, one of the main functions of the family is the reproduction of an offspring and family continuation. Non-compliance with these requirements also created obstacles. These factors were not regulated by any special norms of the church or secular law. They were so obvious that they did not require any legal reservations. However, when violations of these norms occurred, the courts, primarily the church courts, were forced to respond. Age immaturity was considered one such inconsistency. Marriage with parents' and family consent, where the opinion of a groom or bride was not always taken into account, gave rise to strange and unnatural situations in which marriage was concluded between children or one of the parties was still a child, incapable of conjugal cohabitation. Such excesses were not isolated. For example, the noblewoman Maria Popel testified in Przemyśl Episcopal Court that she was only 9 years old when she got married (SAP AGCB, c. 2, p. 163); the peasant Maria from the village of Nanczulki and her husband Stefan, the son of a local priest, claimed to the same court that they got married when they were barely 11 years old (*in Polish* – lat nie miei więcej na iedynascie kiedy szlub brali) (SAP AGCB, c. 2, p. 433); the noblewoman Anna Komarnicka Fagaras claimed that she got married at the age of 9 under duress (SAP AGCB, c. 4, pp. 101–102); the priest from the village of Łużok was challenged in the Spiritual Court for daring to perform a marriage where the bride was only 12 years old (SAP AGCB, c. 8, p. 100).

Another factor that was taken into account when concluding a marriage was the blood and family relationship between future spouses. The legislation of the crown lands of the Old Polish-Lithuanian Commonwealth did not contain clear norms on this issue, since they were regulated by the church. According to the church, it was prohibited to get married with relatives up to the fourth generation, both on the paternal and maternal lines; it was forbidden to marry widows of brothers, uncles, stepmothers, and daughters-in-law. Such marriages were considered invalid, and children from such marriages were considered illegitimate (Dąbkowski, 1910, p. 367). However, as evidenced by everyday practices, these regulations were interpreted quite flexibly. Hence, the nobleman Teodor Kopystynski, after the death of his son Nicholas in 1638, married his bride Maria Horodyska and had a son and two daughters with her (Smutok, 2017, p. 233).

Apparently, remarriage was prohibited if either party had been previously married. This norm was also obvious and did not require special regulation. However, its non-compliance gave rise to legal conflicts, which required the intervention of the church courts. This phenomenon was quite widespread and was caused by various factors. For example, the Tatar attacks of the 17th century led to the destruction of families. One of the spouses was captured and his fate remained unknown. Under such circumstances, a man or a woman remarried. Hence, the parish priest from the village of Stebnyk married 7 men from the village of Hayi, who lost their wives during the Tatar attack of 1696 (*in Polish* – ktorych zony zyją w niewoli) (SAP AGCB, c. 2, p. 375)

In the 17th and 18th centuries, migration in search of a better fate was a fairly typical phenomenon. People from the Carpathian regions went east to Podillia or south to Transcarpathia. Leaving their families, some couples would create new families in a new place within a few years. It is difficult to say how widespread this phenomenon was, but the documents of Przemyśl Episcopal Court indicate that such situations were not exceptional. For example, in 1718 the court considered the case of Jan Jasenycki from the village of Kolpets and Anna Bandrowska. The priest's confession in this case is quite revealing and eloquent. In particular, the local parish priest testified that Jan's wife had lived in Podillia with another man for seven years, but under pressure from the local royal administration he was forced to remarry Jan Jasenycki to Anna Bandrowska (SAP AGCB, c. 8, p. 32). On the same day, the court examined a similar case of a peasant named Basil from Tarnawa, who accused his father-in-law, Petro Koniw, of allowing the plaintiff's wife to marry while he was away working for several years (SAP AGCB, c. 8, p. 33).

**Conclusions.** In the 16th – 18th centuries the creation of a family in the territory of the Ruthenian Voivodeship (present-day Western Ukrainian lands) acquired established forms and procedures. Marriage was concluded with the consent of both parties and with the participation of a wider circle of family, and not only on the initiative of a groom and a bride. The procedure began with an engagement – the preliminary consent of both parties to marriage. This was followed by a marriage contract, the result of which was the conclusion of a marriage contract. The texts of the preserved contracts of the 16th – 18th centuries show that the subject of marriage contracts was primarily material issues. The parties determined the size of the dowry for a bride and obliged her to renounce her rights to paternal and maternal inheritances after receiving the dowry. The groom's party, in turn, undertook, having received the dowry, to record it on part of his real estate. In the 16th – 18th centuries marriage was concluded taking into account the social and public realities of the time and provided for a number of restrictions and prohibitions, the violation of which caused legal conflicts and served as a basis for the annulment of marriage. The materials of the Przemyśl Grodsky and Zemstvo courts and the Przemyśl Episcopal Court testify to this with a rich factual material. Violations of class norms, age restrictions, failure to comply with material obligations of marriage contracts, close blood relationship, different confessional affiliations, etc., often became the subject of court proceedings and could ultimately cause the annulment of marriage.

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**HISTORICAL ORIGIN AND EVOLUTION OF THE “TERRORIST WAR”:  
“SCORCHED EARTH”, ENERGY TERROR AND CRIMINAL RECRUITS  
(MODERN TIMES – THE 21st CENTURY)**

**Abstract.** *The article focuses on the analysis of the essence and key components of the Russian Federation’s “terrorist war” concept based on the analysis of historical military conflicts and their transformation in modern wars. The purpose of the study is to elucidate the nature and structure of terrorist war, in particular terror aimed at the destruction of critical infrastructure, as well as the use of criminal environment in combat operations. Historical parallels between past and modern wars, armed conflicts have been drawn. The methodological basis of the study is the principles of objectivity.*

historicism, systematicity, verification, value orientation and scientificity; problem-search, problem thematic and chronological methods have been applied. **The scientific novelty** consists in the fact that for the first time in the Ukrainian historiography, an attempt has been made to analyze the approbation of the Russian concept components of “terrorist war”, formed by the military leadership of the Russian Federation as a secondary tracing of foreign military theories and practices, with a demonstration of its implementation in the context of world military history. **The conclusions** emphasize that terrorist warfare is a form of warfare involving irregular formations, which mostly include asocial marginality. Its goal is to maintain a permanent state of war, destabilize, destroy and paralyze the political, social and economic institutions of the state and society against which it is waged.

**Key words:** terrorist war; “scorched earth tactics”, energy terror, criminality, private military companies, Russo-Ukrainian war, international humanitarian law.

### ІСТОРИЧНІ ВИТОКИ ТА ЕВОЛЮЦІЯ “ТЕРОРИСТИЧНОЇ ВІЙНИ”: “ВИПАЛЕНА ЗЕМЛЯ”, ЕНЕРГЕТИЧНИЙ ТЕРОР І КРИМІНАЛЬНІ РЕКРУТИ (НОВИЙ ЧАС – XXI ст.)

**Анотація.** У статті досліджено сутність і ключові складники концепції “терористичної війни” РФ на основі аналізу історичних воєнних конфліктів і їхньої трансформації у війнах сучасності. **Метою роботи** є розкриття природи і структури терористичної війни, зокрема, а терору, спрямованого на знищення об’єктів критичної інфраструктури, а також використання кримінального середовища у бойових діях. Проведено історичні паралелі між минулими та сучасними війнами та збройними конфліктами. **Методологічну основу** дослідження становлять принципи об’єктивності, історизму, системності, верифікації, ціннісної орієнтації та науковості; застосовано проблемно-пошуковий, проблемно-тематичний і хронологічний методи. **Наукова новизна** полягає у тому, що вперше в українській історіографії здійснено спробу аналізу апробації складників російської концепції “терористичної війни”, сформованої військовим керівництвом РФ як вторинне калькування іноземних воєнних теорій і практик, із демонстрацією її реалізації у контексті світової воєнної історії. **У висновках** підкреслюється, що терористична війна є формою бойових дій із залученням іррегулярних формувань, до складу яких здебільшого входить асоціальний маргіналітет. Її метою є підтримання перманентного стану війни, дестабілізація, руйнування та параліч політичних, соціальних і економічних інститутів держави й суспільства, проти яких вона ведеться.

**Ключові слова:** терористична війна, тактика «випаленої землі», енергетичний терор, криміналітет, приватні військові компанії, російсько-українська війна, міжнародне гуманітарне право.

**Problem Statement.** The general paradigm of armed confrontation within the Russo-Ukrainian war increasingly corresponds to the content and essence of the concept of “terrorist war”. Its integral components on the part of the Russian Federation are: the organization of large-scale energy terror, the destruction of critical infrastructure facilities, attempts to undermine the logistical foundations of the Defense Forces of Ukraine to destabilize the domestic political situation, and also break the moral and psychological stability of the Ukrainian society and the army through the destruction of the economy.

The relevance of the topic is also due to the fact that the enemy actively involves individuals with distorted legal awareness and criminal pasts in combat operations.

**The purpose** of the study is to analyze the components of the Russian concept of “terrorist war” in historical retrospect and trace its transformation in the context of modern military conflicts.

Chronologically, the study covers the period from the modern times, when professional armies were formed, to modern wars and conflicts. Within this period, we can trace the growth in the use of tactics to destroy the enemy's economic potential and the combat use

of criminal and paramilitary formations operating outside the boundaries of international humanitarian law.

**Review of Recent Research and Publications.** After the start of the Russian Federation's full-scale armed aggression, a number of research appeared *in domestic historical science* devoted to the study of the genetic continuity of the terrorist war in the policies of the Soviet and modern Russian authorities. In particular, in historical research by the Institute of History of Ukraine of the National Academy of Sciences of Ukraine and the Institute for Holodomor Research of the National Museum of the Holodomor-Genocide (Smolii, 2023; Movchan, 2022) the Soviet “scorched earth” tactics and its active use by the Russian armed forces during the full-scale invasion of Ukraine have been analyzed.

The issue of involving criminal elements in the hostilities in eastern Ukraine (in the ATO/OOS zone) is thoroughly examined in the study by Mykola Chaplyk “Criminal Involvement in Hybrid Warfare: View through the Prism of Ukrainian Realities” (Chaplyk, 2019). The focus is on the influence of the Russian special services on organized crime, in particular on the institution of “thieves in law”, with the aim of involving them in hybrid warfare.

Various aspects of energy terror by the aggressor state have been studied by such Ukrainian scholars such as Natalia Horlo (Horlo, 2024), Oleksandr Saliuk-Kravchenko (Saliuk-Kravchenko, 2023), and Taras Zhovtenko (Zhovtenko, 2022). These studies deal with the analysis of threats to energy security, particularly in the context of military operations.

The studies of Alexander Schwarz and Maria Grigat (Schwarz, Grigat, 2015), Emmanuel Kreike (Kreike, 2021), and Georgiana Banita (Banita, 2008) focus on the strategy and tactics of “scorched earth”, its impact on political processes, the social sphere, and the environment, using examples from both historical and contemporary events.

The potential of various forms of terrorist warfare as models for explaining and predicting combined manifestations of violence has been revealed in the studies of the British and German scholars: Andre Python, Andreas Bender, Anita Nandi, Penelope Hancock, Rohan Arambepola, Jürgen Brandsch and the others (Python, Bender, Nandi, Hancock, Arambepola, Brandsch et al., 2021).

A separate layer of research focuses on the mechanisms of countering the terrorist war by the political institutions of states. Using the example of neutralizing jihadist attacks, these mechanisms are analyzed by Christof Nägel, Amy Nivette, and Christian Czymara (Nägel, Nivette, & Chimara, 2024).

The study of the British researchers Ivor Sokolić, Denisa Kostovicova and Sanja Vico (Sokolić, Kostovicova, Vico, 2024) highlights the manifestations of war terror by both combatants and non-combatants – representatives of state and non-state military formations – during the conflicts in Croatia, Bosnia and Kosovo. The legal decisions of the relevant institutions of Europe and the former Yugoslavia are separately analyzed.

The issue of private military companies participation (PMCs) in the armed conflict between Russia and Ukraine is discussed in the studies by Andrew Bowen (Bowen, 2023) and Christopher Spearin (Spearin, 2024). The authors focus on the social composition of these formations, the peculiarities of their combat use, and also compare the Russian and Western models of creation, functioning, and control of PMCs.

Regarding the use of Russian sources, the authors of this article resort to their fragmentary citation exclusively for analytical purposes – for critical understanding of hostile narratives, identifying sources of conceptual borrowings and tracking their impact on the military practice of the Russian Federation. This approach is consistent with the recommendations of

the Ministry of Education and Science of Ukraine dated October 25, 2024, which provide for careful and verified use of hostile sources in order to counteract information manipulation and ensure the scientific validity of the research.

**Research Results.** The failure of Putin's "blitzkrieg" in February – March 2022, a partial loss of strategic initiative, and the successful counteroffensive operations of the Armed Forces of Ukraine in Kharkiv and Kherson directions (Kharuk, 2023), which led to large-scale territorial liberations, caused a radical change in the strategy of the Russian Armed Forces. Since then, the dominant vector of the Russian army's actions has been the provisions of the concept of "terrorist war", formulated by Lieutenant General S. I. Skokov, former Chief of the General Staff of the Ground Forces of the Russian Armed Forces in 2010 – 2012. This concept was first tested during the Russian military operation in Syria.

At the present stage, no army, waging an aggressive war against another state, is capable of achieving victory without unacceptable (even under the conditions of conditional admissibility of this criterion) human losses. To circumvent this "problem", the Russian military leadership has created a new type of war model – a terrorist war, based on the use of "cheap" mass force recruited both within the country and in neighbouring states, as well as on the targeted destruction of the critical infrastructure of the enemy state.

At the same time, a modern historical context has created a paradoxical situation: the means of destruction are more expensive than the objects being struck. Under the conditions of such a shift in cost ratios, the essence of "the terrorist war" is not to achieve military victory, but to destroy the country as an independent economic unit. Its main goal is to create chaos: destroyed infrastructure, destabilized economy and broken mechanisms of state governance should undermine the country's ability to resist. In such a model, the seizure of territories is relegated to the background, instead the key tool becomes the systematic terrorization of the civilian population. In this sense terrorist war is the fastest and least expensive way to achieve the strategic collapse of statehood: provoking public dissatisfaction with the government, social unrest, moral and psychological exhaustion of the army and civilians (Hula, & Diatlova, 2021).

The concept of "terrorist war" cannot be considered as a purely Russian "exclusive" product. Similar examples may be found in the history of both Russia and other countries. Moreover, as the Russian military sources and communications show, foreign experience is carefully studied by the enemy with the aim of adapting it. The origins of the implementation of the terrorist war misanthropic logic can be traced back to the pre-revolutionary history of Russia. A striking example of the use of total "scorched earth" tactics was the activities of the commander of the Separate Caucasian Corps, General O. P. Yermolov, in 1816 – 1826. He organized mass terror and an economic blockade of the Caucasian peoples with the aim of their complete subjugation. His combat practice was directed not only against the armed groups that resisted, but also against the civilian population that gave them shelter. If the villagers came to the defense of such families, the entire settlement was subject to physical destruction. Thus, the village of Dady-Yurt was wiped off the face of the earth as well as its inhabitants – only because they refused to betray the resistance fighters and ignored the ultimatum to leave their homes (Buket, 2023).

The application of a similar logic – the targeted destruction of the enemy's economic base – also took place outside of Russia. A prime example is the actions of the US Army General William T. Sherman during the Civil War between the North and the South (1861 – 1865). During the so-called "March to the Sea" (November 15 – December 21, 1864),

W. T. Sherman’s troops carried out a large-scale destruction of the military and civilian infrastructure of the states of Georgia and South Carolina. The goal of this campaign was to exhaust the South economically and deprive the Confederacy of the freedom to resist. W. T. Sherman estimated the damage at \$100 million – the equivalent of approximately \$982 million (dollar rate as of 2023) (Hudson).

The practice of destroying material resources in order to deprive the enemy of the ability to use critical infrastructure, industry, and agriculture for military purposes was actively implemented in Ukraine during World War II.

On June 29, 1941, the Council of People’s Commissars of the USSR and the Central Committee of the All-Union Communist Party (Bolsheviks) sent a directive to all party and Soviet bodies demanding “to unconditionally destroy all valuables that cannot be taken out during the withdrawal of troops” (Smolii, 2004). As a result of this order, entire industrial complexes built during the first five-year plans were blown up. In particular, all nine generators of the Dnipro Hydroelectric Power Plant were destroyed, as well as 12 concrete pillars of the dam, which put the entire station out of action. A powerful explosion caused the flooding of a large riverside area up to the town of Nikopol, as a result of which numerous Soviet servicemen who were in the area of the man-made disaster died (Lytus, 2019).

On July 26, 1941, the command of the troops of the Southwestern Front, together with the Central Committee of the Communist Party of Ukraine (Bolsheviks), called on the population of the occupied regions to completely destroy the crops of grain and industrial crops so that they would not fall into the hands of the enemy. The appeal carried the slogan: “Not a single gram of grain for the enemy! Mow exactly as much as you need for the near future” (Zolotarev, 1999, p. 82).

In October 1941, Deputy People’s Commissar of Internal Affairs of the USSR I. O. Sierov personally supervised the evacuation and implementation of special measures in Donbas. At the same time, the local population, in particular the miners of Voroshylovhrad region (nowadays – Luhansk), resolutely resisted the preparations for the destruction of the mines. According to the report of the Deputy People’s Commissar of Internal Affairs of the Ukrainian SSR S. R. Savchenko to the People’s Commissar L. P. Beria, 87 miners were arrested in the region, accused of “anti-Soviet actions”, of which 67 (77%) received death sentences. In total, during the evacuation and liquidation of industrial facilities in the region, 123 people were arrested who actively protested against the “special measures” (Demydov, 2009, p. 114). From the memoirs of V. Romanchenko and V. Demenkov, it is known that the miners, preparing to destroy the mines, turned to the special teams with the words: “You will retreat, and the Germans will come – and what will we do? At least we could work in the mine...” (Tytarenko, 2011, pp. 146, 149).

The “scorched earth” tactics was also used during the defense of Moscow in the autumn of 1941. According to the order of the Supreme High Command Headquarters No. 0428 of November 17, 1941, the military command was ordered to destroy all settlements that were in the enemy’s rear, to a depth of up to 40 km from the front and up to 30 km from the flanks. For this purpose, it was allowed to use any means of fire and sabotage groups. Although these measures were justified by military necessity – the destruction of the enemy’s rear infrastructure – they violated the norms of international humanitarian law. The same order provided for the evacuation of civilians in the event of a forced retreat. Among the military, partisans and underground fighters, this order received an ironic name: “Drive the Germans into the cold!” (Prikaz, 1941).

The idea of destroying critical infrastructure as a means of achieving victory in war can be found in Giulio Due's theory of air warfare. This Italian general formulated the concept of the so-called **strategic bombing** in the 1910s and 1920s – the delivery of massive air strikes on targets deep behind enemy lines. In his opinion, destabilization of life support systems can cause social explosions that will force the enemy government to make concessions or surrender under pressure from its own population. D. Due believed that by establishing dominance in the air, aviation could decide the fate of the war by striking at state and economic centres in the rear (Biryukov, 2023).

It is enough to add modern means of air and space attack to classic aviation, and we will get an updated, technologically enhanced version of this concept under the conditions of the Russo-Ukrainian war. It is according to this logic that the Russian Federation carries out massive missile attacks on critical infrastructure facilities in Ukraine, in particular during the heating season. Such strikes create extreme conditions for the civilian population, and therefore have all the hallmarks of a **war crime**, which can be qualified as **energy terror** within the framework of the implementation of the concept of terrorist warfare.

The social support of terrorist armies is usually a criminalized environment, politically and economically motivated to participate in armed violence. This primarily concerns individuals with a criminal past as part of illegal (“voluntary”) armed groups. At the same time, the involvement of criminals in military affairs is not a new phenomenon – in modern history, military political regimes use asocial elements in armed conflicts actively.

Thus, during the heyday of the British maritime dominance (the 16th – 18th centuries), Queen Elizabeth I officially recruited captains of pirate ships and even entire pirate squadrons into service. The most famous among them were John Hawkins and Francis Drake, who were knighted.

During World War I, the armies of Great Britain and post-Romanov Russia practiced replenishing mobilization resources at the expense of the criminal element (Hula, & Perederii, 2025; Gula, & Perederii, 2018, pp. 56–57). Criminality was used especially actively during the years of the civil war in the territories of the former Russian Empire, primarily in the ranks of the “Red Guard” and the Workers' and Peasants' Red Army. The increase in the level of general criminal and “revolutionary” crime in those years became the basis for radical violence, redistribution of property and chaos. Under these conditions, revolutionary ideas attracted broad masses of the marginalized population, which resulted in the formation of a new social base for terror. The destruction of state institutions caused a surge of revolutionary banditry – mass robberies, murders and settling political scores under the guise of ideology. For example, in Katerynoslav (nowadays – Dnipro) on December 28, 1917, after seizing power, the Red Guards shot more than 300 fighters of the Haidamak detachment, who had already laid down their weapons (Tepliakov, 2015, p. 49).

The Bolsheviks tried to use the “mobilization” potential of the criminal world systematically. A textbook example is cooperation with the famous Odesa criminal authority Mykhailo (Moses) Vinnytsky, better known as Mishka Yaponchuk. In his memoirs “Notes of a Chekist” F. T. Fomin wrote: “Mishka Yaponchuk had at least several thousand people at his disposal... He was called the “king” of Odesa thieves and robbers...” (Fomin, 1964, pp. 66–67). In 1919, after the capture of Odesa by the Red Army units, Vinnytsky appealed to the new authorities with a proposal to establish his own combat unit: “We want to fight honestly for the Soviet power. Could you give me a mandate to form the Red Army detachment? I have the people, the weapons too, I have no need for money” (Fomin, 1964, p. 69).

Thus, there was established Soviet Revolutionary Regiment 54 named after Lenin, which became part of Rifle Division 45 under the command of I. Ya. Yakir (Hrynshtein, 1927, p. 89). However, his “combat baptism” ended in defeat: the unit abandoned its positions in panic, and M. Vinnytsky was shot at Voznesensk station for refusing to obey orders.

Another example is Brigadier General H. I. Kotovsky, legendary in the Soviet propaganda. Until 1918, he had the status of a recidivist, but later he effectively fought against the Makhnovtsi and Antonovtsi (Panfilov, 2016).

The participation of former convicts in the hostilities of World War II is widely known. According to the Decrees of the Presidium of the Supreme Soviet of the USSR of July 12 and November 24, 1941, tens of thousands of people were released from prison early to recruit the army. In 1942 – 1943, 157 thousand convicts were mobilized by the decision of the State Defense Committee. In total, from the beginning of the war to June 1944, 975 thousand former prisoners joined the ranks of the Red Army (Zemskov, 1991, p. 24).

In recent history, mercenaryism, without regard to criminal pasts, has become the basis for the formation of non-state armed structures, such as the French Foreign Legion.

The active involvement of the criminal element since 2014 in the ranks of the so-called “DPR and LPR corps” enables the British historian and analyst M. Galleoti to assert: “A large number of militants fighting for the DPR and LPR are members of organized criminal groups who simply took advantage of the opportunity to become rebels... It is absolutely obvious that Moscow considers local criminal groups as a useful force in its struggle” (Tlisoa, 2015).

With the beginning of the large-scale invasion of the Russian Federation, the practice of recruiting criminal elements was actively adopted by private military companies. According to open media and communication sources, in the autumn of 2022, when recruiting to the Wagner group, priority was given to prisoners convicted of serious crimes, in particular under the articles: “murder”, “robbery”, “robbery”, “grievous bodily harm”, as well as recidivists (Rofe, 2022). In July 2023, internal sources of the Wagner PMC reported that about 78 thousand people passed through its ranks, of which 49 thousand were former prisoners (Blizkiy, 2023).

With a high degree of probability, modern Russian PMCs (before their inclusion in the structure of the military organization of the Russian Federation from 01.07.2023) may be considered as an analogue of the so-called “terrorist armies” – armed formations created and maintained by terrorist regimes, organized criminal groups or criminal business structures. Their main purpose is to ensure the interests of these actors through systemic armed violence, in particular within the framework of the terrorist war.

Cynically, but objectively evaluating the role of criminality in past and present wars, we may state: this social group is involved not only for the application of cruel and illegal methods of warfare, but is also used as a “disposable resource” – for the **actual disposal** of individuals with deviant legal consciousness. Under the conditions of hostilities, they often serve as “cannon fodder”.

**Conclusions and Prospects for Further Research.** As a result of the study, it has been found that a terrorist war as a form of armed confrontation is a consciously chosen and purposefully implemented strategy of the aggressor, aimed at a systematic destruction of statehood, moral and psychological state of society and the functioning of basic infrastructures. It combines methods of total terror, hybrid threats, destruction of the rear and the use of criminalized resources for conducting military operations.

The concept of terrorist warfare is not an exclusively modern Russian product – its origins can be traced back to many historical examples, from colonial expansion to world

wars. Russia has adapted classic approaches (including “scorched earth” tactics, strategic rear bombing, and criminal involvement) to the realities of the 21st century, integrating them into its modern military doctrine. The criminal contingent is used not only as a source of “manpower”, but also as an instrument of cruelty, psychological pressure and extreme impersonality of war, which turns it into a mechanism of terror. Massive attacks on critical infrastructure facilities, especially in the energy sector, indicate the conscious use of energy terror elements, which grossly violates the norms of international humanitarian law.

Further scientific study of this issue requires a conceptual understanding of terrorist warfare as an independent phenomenon in the field of modern military history, political science and international law. An important direction is also the formalization of the terminological apparatus and a clear legal definition of the concept of “terrorist warfare” in national and international legislation. No less relevant is a deeper analysis of the sources and mechanisms of involvement of the criminal contingent in hostilities, in particular in the format of private military companies, as well as the study of the long-term consequences of such a policy for the security environment.

Particular focus should be on comparative research of similar conflicts in other regions of the world, where similar destructive strategies were used, which will enable us to identify recurring patterns and regularities. In this context, interdisciplinary approaches that will enable us to study the impact of the terrorist war on the transformation of the humanitarian, energy, information and security architecture of modern states.

A comprehensive interdisciplinary development of terrorist warfare issues will enable not only a deeper understanding of the nature of modern wars, but also the formation of effective models for countering aggression that uses the strategy of targeted terror as the main tool of pressure.

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**THE JEWISH POPULATION OF THE RUSSIAN-AUSTRIAN BORDERLAND  
AT THE TURN OF THE 19th – THE 20th CENTURIES: ECONOMIC ACTIVITIES  
AND DAILY PRACTICES (BASED ON DOCUMENTARY POSTCARDS)**

**Abstract.** *The relevance of the study is determined by the shifts in recent decades in the perception of visual sources, as intellectual activity has encouraged researchers “to rediscover” their sources. The research priorities reorientation has led to the academic community recognizing documentary postcards and their written messages as significant sources with great potential for understanding a spiritual and material life, everyday practices, and mentality of the population of a given era. The purpose of the research is to outline the economic activities, everyday practices, and interactions with the surrounding world of members of the Jewish communities in the region of the eastern section*

of the Russian-Austrian borderland at the turn of the 19th – 20th centuries. The main source of the study consists of nearly 400 documentary postcards from private and museum collections, published in 1896 – 1918. **The research methodology** is based on the application of analytical and synthetic, historical and cultural attribution, iconographic, and comparative analysis methods. **The scientific novelty** of the study consists in expanding current understanding of the economic activity and everyday practices of the Jewish population in the Russian-Austrian borderland at the end of the 19th century, on the eve of and during World War I. **Conclusions.** The iconography of the postcards represents the everyday visual world of the Jewish population in the Russian-Austrian borderland, offering personal testimonies and opening up avenues for the study of their culture, economic activities, and daily practices. The imagery affirms that the synagogue functioned as the focal point of the Jewish communal life, while religious rituals-binding for all members of the community-constituted the supreme normative framework. The unquestioned authority of rabbis is reflected in their portraits and the depictions of their residences featured on the postcards. The visual content of the postcards attests to a significant role played by the Jewish entrepreneurs in the economic development of the imperial borderlands across adjacent regions. It visualizes the economic activity of the Jewish capital in the sugar, flour-milling, timber, and brick industries within the border provinces of the Russian Empire. This involvement contributed to the completion of the industrial transformation in the frontier regions – Volhynia, Podillia, Bukovyna, and Eastern Galicia. It also facilitated the development of transport infrastructure, accelerated urbanization processes, and led to the numerical predominance of the Jews among the urban population in the contact zone between the two empires. The imagery captured on the postcards documents the national character, leisure activities, domestic life, traditional dress, and everyday practices of the Jewish communities members. It reflects the patriarchal structure of the family, where male authority and leadership were dominant, yet women played a decisive role in key family decisions, upheld the Jewish religious principles, and ensured the satisfaction of daily needs. The postcards also reveal that individuals who sought to break away from familial and communal authority often renounced tradition and, as a result, faced social condemnation. The prevalence of antisemitism and the outbreak Jewish massacres, prompted waves of emigration from the western provinces of the empire to countries across the American continent. At the same time, the visual materials from World War I period attest that, even amid the turmoil of war, members of urban Jewish communities, despite numerous hardships and obstacles, persisted in maintaining established economic routines and everyday practices.

**Key words:** Jews, Jewish population, Austro-Russian borderland, postcard, documentary postcard, visual source.

## ЄВРЕЙСЬКЕ НАСЕЛЕННЯ РОСІЙСЬКО-АВСТРІЙСЬКОГО ПОГРАНИЧЧЯ НА ЗЛАМІ XIX – XX ст.: ГОСПОДАРСЬКА ДІЯЛЬНІСТЬ І ПОВСЯКДЕННІ ПРАКТИКИ (ЗА ДОКУМЕНТАЛЬНИМИ ПОШТІВКАМИ)

**Анотація.** Актуальність дослідження визначається змінами останніх десятиліть у ставленні до зображальних джерел, коли інтелектуальна активність спонукала дослідників “віднаходити” своє джерело. Переорієнтація дослідницьких пріоритетів зумовила визнання академічною спільнотою документальних поштівків і їхніх листовних повідомлень як вагомих джерел з великим потенціалом для розуміння духовного та матеріального життя, буденних практик і менталітету громадянства відповідної епохи. **Метою** статті є окреслення господарської діяльності, особливостей буденних практик, взаємин із навколишнім світом представників єврейських громад у регіоні східної ділянки російсько-австрійського пограниччя на зламі XIX – XX ст. Основним джерелом слугували майже 400 документальних листівок із приватних і музейних колекцій, виданих в 1896 – 1918 рр. **Методологія дослідження** ґрунтується на застосуванні аналітично-синтетичного, історико-культурної атрибуції, іконографічного й методу порівняльного аналізу. **Наукова новизна** полягає у розширенні уявлення про господарську діяльність й повсякденні практики єврейського населення російсько-австрійського порубіжжя наприкінці XIX ст., напередодні та в роки Першої світової війни. **Висновки.** Іконографія поштівків репрезентує повсякденний візуальний світ єврейського населення російсько-австрійського пограниччя, їх особисті свідчення та відкриває можливості вивчення їх культури, господарської діяльності і повсякденних практик. Їх зображення підтверджує, що центром життя єврейських громад

була синагога, а найвищим законом – релігійні обряди, які стосувалися всіх членів громад. Про беззаперечний авторитет рабинів свідчать їхні портрети й види їхніх резиденцій на поштівках. Їх зображальний ряд засвідчує важливу роль єврейських підприємців у розвитку економіки пограниччя імперій у межах суміжних регіонів, візуалізує економічну активність єврейського капіталу в цукровій, борошномельній, деревообробній, цегельній промисловості прикордонних губерній Росії, що сприяло завершенню промислового перевороту в регіонах порубіжжя – Волині, Поділля, Буковини й Східної Галичини. Це сприяло розвитку транспортної інфраструктури, прискорювало урбанізаційні процеси та зумовило чисельне переважання євреїв серед жителів міських поселень стикового прикордоння двох імперій. Зображення поштових листівок зафіксували національний колорит, дозволя, побут, традиційне вбрання та повсякденні практики членів єврейських громад; підтвердили владу і лідерство чоловіка в родині, хоча жінка приймала ключові рішення, дбала про дотримання іудейських принципів, забезпечувала повсякденні потреби. Вони також зафіксували, що охочі звільнитися від влади родини й громади зрікалися традицій і зазнавали осуду. Внаслідок антисемітизму та єврейських погромів відбувалася еміграція єврейського населення західних губерній у країни американського континенту. Водночас зображальний ряд поштових листівок періоду Першої світової війни засвідчив, що навіть у буремні роки члени єврейської громади міст, долаючи усілякі труднощі і перешкоди, продовжували усталені економічні й повсякденні практики.

**Ключові слова:** євреї, єврейське населення, австро-російське прикордоння, поштівка, документальна листівка, зображальне джерело.

**Problem Statement.** The territory of Ukraine has been home to one of the largest Jewish communities in Europe for centuries, and new perspectives for studying them can be found in the information potential of pictorial sources (photographs, documentary postcards/postcards), which have been long underestimated. The attitude to these pictorial materials has changed in the light of the current situation in source studies, when intellectual activity has encouraged researchers, as Jacques Le Goff said, to “construct” and “discover” one’s source. The refocusing of research priorities has led the academic community to recognize documentary postcards and their letters as valuable sources (documentary illustrations – *author’s note*) with great potential for understanding the spiritual and material life, everyday practices, and mentality of citizenship of the corresponding era.

**Review of Sources and Recent Research.** The historiography of the problem consists of the researchers' works who analyzed the documentary postcards with the Jewish subjects and described the role of Jews in the socio-economic life of the region. Historians and anthropologists mostly used event postcards as illustrations, sometimes analyzed their visual content, and did not develop methods for their analysis. X. Marici-Sabol and S. Puritsi emphasized the respect of Austrian postcard publishers for the Jewish community of Bukovyna in the early 1900s, whose prints demonstrated their significant role in the economic life of the region (Marici-Sabol, & Purici, 2020). G. Kubicha examined ethnographic photographs of the Polish Jews, and K. Walilewska-Predka studied the versatile photographs published by the Austrian and Polish publishers of documentary postcards (Kubica, 2015 – 2016; Wasilewska-Prędko, 2019). S. Kopylov and I. Paur noted the colourful images of the Jews on postcards from M. Graham’s Podillia Types series, analyzed images of Jewish architecture in Eastern Podillia on documentary postcards, and studied the everyday activities of the residents of Middle Podnistrovia in the early twentieth century (Kopylov, & Paur, 2019, 2021). The collectors initiated the publication of thematic albums with postcards from public and private collections that preserved the history of regions, cities, and rural settlements of Right-Bank Ukraine and neighbouring countries (Duda, & Sosenko, 1997; Oprea, 2007; Kotłobułatowa, 2006; Zabochen, Polishchuk, & Yatsiuk, 2000; Fedosiuk, 2008, Poberezhnyk, 2017; Fedoryshen, 2014). Their illustrative materials were used as sources, and

the comments and notes in these publications became a kind of research on the problem under study. I. Monolatii examined little-known facts of the biography and the main milestones in the life and activity of the Ukrainian publisher of the Jewish origin Ya. Orenstein, who was a publisher of documentary postcards, and analyzed his place and role in the Ukrainian-Jewish cultural and political relations in the first third of the twentieth century (Monolatii, 2025). J. Petrovsky-Shtern describes the economic, religious, and cultural life of the Jewish townshetl in Ukraine in the 18th and the 19th centuries (Petrovsky-Shtern, 2019).

Several types of images were identified on documentary postcards of 1896 – 1918 (almost 400 were examined) from museum, library, and private collections in Ukraine, Poland, and Romania, as well as their reproductions in albums, exhibition catalogues, scientific publications, and electronic copies on the Internet auction sites. These are the following ones: 1) photographs and reproductions of works of fine art depicting the Jewish types, religious and public buildings, and historical, architectural, and memorial monuments of the Jewish communities; 2) photographs of industrial production, commercial establishments, and transport owned or tenanted by the Jews; 3) photographs depicting the course of economic, religious life and everyday practices of the Jews on both sides of the Russian-Austrian border. The authors also took into account and analyzed various aspects of the philcartographic materials used: publishers, concept, subject matter, reception, etc.

**Research Purpose.** The article aims at outlining the economic activities and day-to-day life of Jewish communities in the eastern part of the Russian-Austrian borderland based on information documented in postcards.

**Research Results.** During the “long nineteenth century”, the largest Jewish community in Central and Eastern Europe was divided between the Russian and Austrian (since 1867, Austro-Hungarian) empires. The largest number of Jews inhabited the region of the borderlands (borderlands or interregnum – *authors' note*) of the states, which, due to its proximity to the state border, was the area of intersection of various cultural, religious, political influences and interethnic contacts, which resulted in an “ensemble of invisible ties” (Pierre Bourdieu). The borderland was a zone of attraction, an area of mutual repulsion, and a space of manipulation, which dictates the relevance of blending historical, genetic, functional, and psychological approaches to its characteristics (Veremnych, 2023, p. 311). There the system was formed by a specific atmosphere of the borderland (a zone along the state border line with a width of 5 to 100 km – *authors' note*), whose defining features were the state border and the possibility of relations between residents of adjacent regions of neighbouring states. After the third partition of the Polish-Lithuanian Commonwealth, the eastern section of the border between the Romanov and Habsburg empires ran from Melnyk in Podlasie, south along the Buh River through Włodawa, Berestechko, Brody, Zbarazh, then along the Zbruch through Ozhyhivtsi, Volochysk, Pidvolochysk, Tarnoruda, Sataniv, Husiatyn until it flows into the Dniester near the village of Isakivtsi, and then along the Dniester to Novoselytsia in Bessarabia.

By featuring views of the state border line, images of border guards, customs officers, and travellers at border crossing points in Husiatyn, Novoselytsia, Pidvolochysk, Radziwill, and the others, the Austrian publishers emphasised the impact of the borderland situation on the economic life and the daily routine of the inhabitants of the border regions. The duplication of these prints demonstrated the power and efforts of the state to protect the borders and served as a prevention of illegal criminal acts (Kopylov, & Paur, 2022, p. 35). The images of uniformed border guards, customs officers, and quarantine officials on duty were also an expressive visual representation of state interests (Collection of postcards of Iryna Paur

(Kamianets-Podilskyi) – next CP Paur). At the same time, to promote the frontier among merchants and tourists, publishers circulated postcards with sights of historical and natural monuments and settlements along the state border: Volochysk, Zhvanets, Zoloty Potok, Iziaslav, Kovel, Kopychynets, Kryvch, Okopy, Radzivilov, Skala, etc.

On the borders of the Habsburg and the Romanov empires, the Ukrainians, the Jews, the Russians, the Moldovans, the Germans, the Poles, the Romanians, and other ethnic groups lived “together and apart”: they were united by the territory they inhabited, but separated by ethnic, religious, and social barriers. On the postcard “Gruss aus der Bukowina” (1899), the Austrian publishers placed models of the main ethnic groups of the multinational region: the Romanians, the Ukrainians, the Hutsuls, the Lipovans, and the Jews (**Fig. 1**); on another one, three representatives of the Jewish community and a synagogue in the religious centre of Hasidism, Sadgora (Sadaguri) (CP Kopylova). These images focused on the significance of Jews, one of the largest groups in the region. The rate of Jewish concentration among the population of Bukovyna was 15,2%, while in the neighbouring regions, it was slightly lower: in Eastern Galicia – 13,1%, in Volyn province – 13,2%, and Podillia – 12,2% (Beauvois, 2023, p. 36).



**Fig. 1. Types ethnic groups of Bukovyna**

*(Gruss aus der Bukowina. Verlag von Leon König Papierhandlung, nr 258, Czernowitz, 1899)*

Jewish communities on the border of the empires were not socially homogeneous, which was reflected by the Austrian and Polish publishers of documentary postcards. Talmudists (Torah scholars – *authors*), who devoted their lives to intellectual improvement and religious development, were the most reputable, and their portraits were reproduced on postcards to emphasize their importance in the life of Jewish societies (Duda, & Sosenko, 1997, p. 70). At the same time, we hardly ever come across their images in the Russian publishers, which confirms the prevailing xenophobia and hostile attitude of imperial society towards religious Jews and prohibition of official censors on their reprinting.

The majority of the Jews on the Russian-Austrian borderline lived in families and couples, so despite social stratification and financial inequality, the Jewish family was a self-sufficient institution. A housewife played a significant role in ensuring their well-being and organizing their everyday life. Only occasionally, however, we find images of the Jewish women next

to shops or stalls at the market squares of cities and towns, among peasant traders at markets (Collection of postcards of Serhiy Kopylova (Kamianets-Podilskyi) – next CP Kopylova). These prints prove that the Jewish hostesses made important decisions, sold groceries at the market or in shops in private houses, ran taverns, cooked, looked after livestock, kept the house in order, and took care of observing the Jewish traditions. Their daily work in the family business and the satisfaction of everyday needs demonstrated that the Jewish family despite, social stratification and financial inequality, was a self-sufficient institution.

At the end of the 19th century, wealthy entrepreneurs, successful businesses, and land tenants, who, on their initiative, achieved financial success and became respected guild merchants, financiers, and industrialists, emerged from the Jewish communities of the borderland. Talented and successful representatives of the “free professions” distinguished themselves from the communities, and their portraits on postcards by Austrian, Jewish, and Polish publishers emphasized their important role in the cultural and healthcare life of the urban settlements (Kopylov, & Paur, 2021, p. 16).

Trade and middle-management activities were the most relevant segment of the Jewish economic activity. This type of entrepreneurship, which imposed almost no personal obligations on the organizers, was physically easier than agriculture, provided greater profitability, mitigated potential political persecution, and gave them the freedom to move freely and travel abroad. To carry out trade operations, the Jewish merchants systematically, sometimes daily, crossed the state border, the land and water frontier that separated territories of the countries. Undoubtedly, the border factor had a significant impact on the economic activity and everyday life of merchants, who, while crossing the border, established contacts with the border guards, customs officials, and travellers, including merchants and tourists, which became a very common occurrence for them (CP Paur).

Usually, successful Jewish entrepreneurs, like ordinary traders, organized and participated in smuggling activities: they smuggled illegal immigrants across the border, transported stolen cattle, transported banned publications and various restricted goods from Austria to the Russian Empire, etc. Austrian publishers were eager to replicate views of the Austrian-Russian border, checkpoints, border guards, and customs administrative buildings, which intended to convince ordinary citizens that the border guards were reliably protecting state interests (CP Kopylov; CP Paur).

The major type of economic activity of the Jews on the Russian-Austrian border was trade and intermediary activity. The main figures of the Jewish trade were the privileged members of the merchant guild, wealthy merchants, and shopkeepers, who were very important in economic relations and everyday life in the region. This aspect of the region’s economic life was documented by postcard publishers, in pictures of streets and market squares in Tulchyn, Kamianets-Podilskyi, Vinnytsia, Medzhybizh, Proskuriv, Lutsk, Ostroh, Rivne (Kopylov, & Paur, 2019, pp. 188; Fedoryshen, 2014, pp. 34, 36; Kopylov, & Paur, 2021, p. 15; CP Kopylov; Pryscheпа, 2010, pp. 114–115), and the others which showed the facades and advertisements of shops, most of which were owned by the Jewish entrepreneurs. Due to their initiative and efforts in the cities and towns of Volyn and Podillya provinces, steady trade acquired qualitatively new forms and successfully performed the function of turnover from the production sector to the consumer sector, increasing its volume and expanding the range of goods.

The postcards demonstrated that the railway stations of Zhmerynka and Zdolbuniv (**Fig. 2**) became the centres of trade, with 31 retail establishments operating in 1903 and daily markets being held near the railway station.



**Fig. 2. Zdolbuniv. Vokzalna Street**

*(g. Zdolbunov. Vokzalnaya ulica. Izd. Kontragenstva A.S. Suvorina i K<sup>o</sup>, nr 2, Moskva, 1916)*

At the turn of the 19th and 20th centuries, permanent trade was closely connected with market trade. On postcards Austrian and Russian publishers depicted trading at fairs and markets in Brody, Husiatyn, Zholkva, Zalishchyky, Zoloty Potik, Kamianets-Podilskyi, Kolomyia, Letychiv, Medzhybizh, Nemyriv, Skala, and Chortkiv, when the Jews welcomed peasants who had arrived from local villages, readily bought fresh products from them, and, having received money, the latter went to the Jewish shops and taverns. Such trips abroad expected the participation of the Jews in various trade practices: negotiations, purchases, or sales of goods.

At fairs and market squares in cities and towns, the Jewish artisans and traders, as well as peasants from the surrounding villages, were captured by local photographers, and their portraits against the background of market squares with rows of shops, horse-drawn carts with various goods, and bidders were among the most common subjects of documentary postcards. All this attention of Jewish entrepreneurs and postcard publishers (G. Wasserman, L. Warhaftig, L. Hochman, D. Lachmanowicz, J. Orenstein, E. Hayes, G. Spizman, and the others) to fairs, markets, and ordinary vendors' markets emphasized the importance of the trade sector in the economy of the Pale of Settlement and the primary role of Jewish merchants in its organization. It should be mentioned that markets and fairs in urban and rural settlements were perhaps the most important places of the Ukrainian – Jewish interaction.

The centres of Jewish trading and resale in the area borderland were shtetls, small towns with a dominant Yiddish-speaking population among the local population. Trade in shtetls defined and regulated the lives of their inhabitants, primarily Jewish artisans, retailers, and merchants involved in its activities. A characteristic feature of the towns, as seen in the photographs of the artists and postcard images, was the rows of small stalls in the market squares selling textiles or groceries at markets and fairs, which resembled the covered shopping arcades in the large cities of Europe. The Jewish traders owned such pavilions and shops, which were the focal point of annual contracts, Sunday fairs, and weekday trade, in particular in Dunayivtsi, Zhvanka, Zalishchyky, Zinkiv, Sataniv, Felshtyn, Yarmolyntsi, and other areas. Typically, they were captured by local photographers and soon afterwards on postcards of local publishers.

The Jews from the settlements along the Dniester or Cheremosh rivers organised the purchase, rafting, and sale of the Carpathian spruce trees, stacking them near the wharves, which usually attracted the attention of local photographers and postcard publishers. In many places on the banks, the Jewish tradesmen set up sawmills where they processed some of the wood used by the population for housing construction (CP Kopylov; CP Paur). The Jews of the town of Kytaihorod in Ushytsia district of Podillia ran mills on the Ternavets, a left tributary of the Dniester, a distillery, two inns, engaged in the carriage trade, and sold bread (Sulkovsky, 1889, p. 644; Kitaygorod, 1885, p. 280). Their significant role in the town's economy was confirmed by the image of the postcard "Yar near Kytaihorod", which shows a cathedral, an Orthodox church, shtetl buildings, and the Jewish cemetery on limestone slopes (Kreczmański, 2007, p. 135).

Taverns and inns (skittles, monopolies – *authors' note*) played an important role in the economic and everyday practices of the Jews in shtetls and towns on the borderlands, being a peculiar core of social, financial, and informational networks. In taverns, the Jews made deals, borrowed money, bought food, exchanged horses, spent the night on the way to the fair, and shared news, etc. In Bukovyna, taverns and pubs were usually located on the main streets, where they were photographed, and later their photos were reproduced on documentary postcards (Cheviuk & Zakharchuk, 2008, p. 30).

There was no shortage of inns and taverns on the Russian frontier, as evidenced by the images of postcards with sights of Zhvanets, Letychiv, Medzhybizh, Nemyriv, Felshtyn, and the others, which were on the routes connecting the most important fairgrounds. To attract customers, tavern keepers had to be creative. Travellers, merchants, and locals could order wine or vodka, have breakfast and dinner, and sometimes spend the night in taverns. In taverns with inns, merchants could leave their horses and carts loaded with goods in a fenced courtyard, the entrance gates of which are sometimes featured on postcards (**Fig. 3**).



**Fig. 3. Tavern with an Inn in Felshtyn**

(*Budivnytstvo tsivilne. Zaїzd v Felshtyni na Pod. Vydavnyche T-vo "Drukar" Kyiv, "Halytska nakladnia" Kolomyia [1919]*)

The regulations of the Russian and Austrian empires allowed the Jewish entrepreneurship in industry and trade as well as the possibility of engaging in usury (lending money at interest).

The moneylenders were representatives of the Jewish monetary capital, shopkeepers, merchants, tavern keepers, and usurers. The role of moneylenders in socioeconomic relations in the Podillia province is emphasized in one of the postcards of the series “Podillia types” by the photographer and postcard publisher M. Graham with a portrait of a Kamianets moneylender, indicated by the universal jewellery scale in his hands (**Fig. 4**).



**Fig. 4. Podillia Types – Kamianets Moneylender**

*(Podolskaya tipa. Types Podoliens, nr 8)*

In the 1900s, the Jewish moneylenders provided loans on a mass scale to migrant workers travelling abroad or to families who decided to emigrate to the United States, Canada, Brazil, and other countries. The space of the Russian-Austrian border became a place of searching for chances, lack of feeling of earth under the feet, and eternal escape. The Jews of Podillia, Kyiv, and Bessarabia provinces left for emigration or to work, usually through checkpoints on the border with the Austro-Hungarian Empire. They travelled on horse-drawn transport along the route Kamianets-Podilskyi-Zhvanets-Isakivtsi-Borshchiv-Ternopil-Lviv. With the opening of the Lviv-Ternopil-Volochysk railway line, Pidvolochysk became one of the main border posts on the frontier of the empires and photographs of the local station building and Austrian border guards in uniform adorned postcards (CP Kopylov). Train traffic through Pidvolochysk was quite busy. The same route was used by the Jews to go to work or emigrate, as recorded by Lviv publisher: “Two Jewish migrant workers were sitting and looking out of the window of a third-class carriage of the Lviv-Vienna train, and their smiling faces radiated hope for the realization of their plans and ideas” (CP Paur). Austrian postcards printed photographs of railway stations in Husiatyn, Zalishechyky, Lviv, Pidvolochysk, and Chernivtsi, as well as numerous bridges used for railway traffic, while Russian postcards featured photographs of railway stations and platforms in Kyiv, Vinnytsia, Volochysk, Zhmerynka, Proskuriv, and Rivne, which were on the way to European countries.

In several places in Volhynia, Kyiv, and Podillia, the Jews were involved in the development of agriculture. However, they were interested in land mainly as a tool for gaining capital for further investment in more profitable sectors of the economy: flour mills, distilleries, breweries, sugar refineries, craft workshops, trade, etc. Instead, publishers

willingly distributed photographs of fields of ripe wheat, apple orchards, grape and sugar beet plantations where the Ukrainian peasants or Czech colonists worked.

Industrial production was critical to the economy of the Russian-Austrian borderland, as witnessed by the numerous images of refineries and breweries, power plants, flour mills, distilleries, sawmills, etc. A similar series of postcards displayed the consequences of the Industrial Revolution and represented the most modern enterprises in the region, some of which were owned or leased by the Jewish capital. The same images showed the importance of the work of industrial workers, for whom “labour” was an integral part of everyday survival, and working with machines and mechanisms, even in handicraft workshops, was filled with ideals of “masculine” mastery of the world.

The development of light industry in the borderland of Podillia province is confirmed by images of two newly built enterprises: the sugar factory of the merchant Solomon Marantz and a steam mill built by this entrepreneur near the railway station Proskuriv in 1892, which for three years in a row became part of the first joint-stock company in the city, the “Proskuriv Mill Production Company of S. G. Marantz”. The depiction of these enterprises was placed on the photo collage of the postcard “Proskuriv” (until 1904 – *authors’ note*), published by the bookstore owner J. Jacemyrska.

Offhanded, Warsaw publisher B. Wierzbicki published a photograph of one of the most famous breweries in Podillia, the Tulchyn Brewery (tenant L. Rosenfeld, director I. Rosenthal), on a postcard for advertising purposes (**Fig. 5**).



**Fig. 5. Tulchyn Brewery**

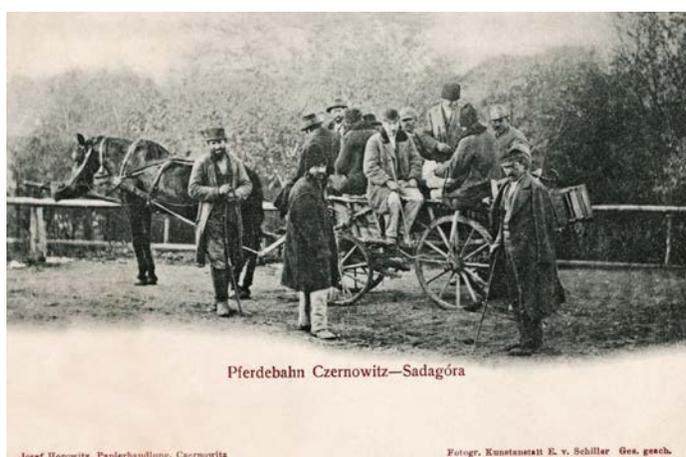
*(Tulczyn, Podole. Browar; Tulchin, Podolsk. Pivovarnyj zavod. Zaklad Fotochem. B. Wierzbicki i S-ka)*

As a rule, publishers tried to visualize new modern industrial facilities for advertising (power plants in Nemyriv and Rivne), famous historical and architectural monuments (Kamianets, Medzhybizh, Khotyn fortresses), and views of the city's central squares and streets (Borshchiv, Vinnytsia, Kovel, Medzhybizh, Proskuriv, Rivne, etc.). Undoubtedly, the choice of industrial facilities for visualization was determined by their appearance, importance in the economic processes of the region, and the interest of their owners or tenants.

The expansion of shareholder campaigns facilitated the penetration of Jewish capital into the sugar industry on the Right Bank of Ukraine. In the early 1890s, the Jews owned 34,6%

of all shares in 28 companies on the Right Bank (Rakovsky, 1992, p. 161). Enterprises, regardless of the nationality of their owners, employed a large community of Jewish employees who held the positions of directors and technical directors, accountants, senior chemists, mechanics, and others. On the eve of World War I, Austrian publishers advertised the Zalishchyky and Kryshchatyk sugar factories on postcards, and the Chikhachov landowners from Murovani Kurylivtsi, where the Jews made up more than the third of the population, circulated photographic postcards with views of their estate, local farm fields, market square, and sugar factory (CP Kopylov).

The Jewish merchants participated in the development of horse-drawn transport in the borderland region, which served the circulation of thousands of people and goods. In the late 19th century, the Jews of Sadhora held the monopoly on the carriage trade on the Chernivtsi-Sadhora-Chernivtsi route, which is evidenced by the images of postcards by local publishers J. Horowitz and W. von Simon Gross (**Fig. 6**).



**Fig. 6. Jewish merchants-carriers of Sadhora**

*(Pferdebahn Czernowitz-Sadagóra. Josef Horowitz Papierhandlung. Czernowitz. Fotogr. Kunstanstalt E. V. Schiller Ges. gesch, [1900])*

The carriers gathered travellers near the railway station and on the banks of the Prut, where they accommodated 8–10 people without any alternative and drove them on long carts for about an hour to the spiritual centre of the Hasidim of Eastern Europe. In Sadhora, there was the residence of the miraculous Rabbi Friedman and a synagogue, the images of which were reproduced on Austrian postcards. The Jewish water carriers from among the traders and residents of the village of Zhabintsi delivered drinking water to the residents of Kamianets-Podilskiy on horse-drawn carts daily from the Hun well or from the surrounding villages for 2–5 rubles per month or 25–35 kopecks of silver per barrel or 3–6 kopecks per bucket (Sementovskiy, 1862, p. 8). The Jewish traders also delivered water to Vinnytsia and Mohyliv-Podilskiy (Karoeva, 1998, p. 24; CP Kopylov).

The wealthiest members of Jewish communities, including successful entrepreneurs, were involved in various charitable projects. The charity was clear evidence of the philanthropists' success, a demonstration of their economic strength and sustainability, a manifestation of

care for their fellow congregants. Taking into account the importance of health care in the daily routine of the Jews, successful entrepreneurs usually initiated the construction of Jewish hospitals at their own expense, which were opened in Balta, Bender, Vinnytsia, Kamianets-Podilskyi, Mohyliv-Podilskyi, and the others in the late 19th century. The ceremonial opening of the Jewish hospital in Balta in 1898 was a grand event for the 13,000-strong Jewish community of Podillia (Kopylov, & Paur, 2021, p. 16). According to a documentary postcard, the meeting was attended by members of the provincial governing board, representatives of the rabbinate, and Podillia's Jews, who were represented by festively dressed men and teenage boys (**Fig. 7**).



**Fig. 7. Ceremonial Opening of the Jewish Hospital in Balta in 1898**

*(Balta. Evrejskaya bolnica, Balta. Jüdisches Krankenhaus, [1900 – 1904])*

On the initiative of philanthropists from the wealthy members of the Jewish community of Bukovyna, an exquisite four-storey Art Nouveau building of the Jewish People's House (an architect T. Levandowski) was built in 1908 on one of the central streets of Chernivtsi. The new building became not only the centre of the Jewish community but also a kind of business card of the city. Its image was repeatedly reproduced on postcards on the eve of World War I. The postcards also featured a photograph of the two-storey Jewish orphanage in Chernivtsi, the cornerstone of which was laid in 1898 to mark the accession of Emperor Franz Joseph to the throne (CP Kopylov).

The Jewish communities of the borderlands, despite their foreign-speaking, usually Christian, surroundings, lived a measured life dictated by historical traditions and religious spirit and characterised by a corresponding rhythm and cycles. The highest law for all religiously observant Jews was religious ritual, which applied to the all members of the community and was strictly observed. The rabbi and religious sage held a very respectful position among the community members, and the miracle-working rabbis of Boyan, Vyzhnytsia, Sadhora, and Chortkiv were considered saints. Every year, on the Jewish holidays, thousands of Hasidim from Bukovyna, Galicia, and the borderlands of the Russian Empire would come together for pilgrimage and prayer to the miracle-working rabbis, where they would receive their blessings. The undisputed authority of the rabbis among the Hasidim was evidenced by their portraits

and views of their magnificent residences in Sadhora and Chortkiv on postcards issued by the Austrian, Jewish, and Polish publishers (Duda, & Sosenko, 1997; CP Kopylov; CP Paur).

The synagogue was the centre of Jewish community life on the borderland, where people gathered for common prayer, study of sacred texts, and solemn ceremonies and court trials. Their significance is confirmed by images on postcards of synagogue buildings of different styles in Volodymyr-Volynskiy, Horokhiv, Kamianets-Podilskiy, Lutsk, Pidhaitsi, Rivne, Sadhory, Chernivtsi, and other cities. However, the publishers did not replicate views of wooden synagogues, which were traditional for shtetls in Podillia and Volhynia. Presumably because of their less-than-presentable appearance. It was only after the collapse of the Habsburg Empire that three postcards with views of Jewish buildings were printed in the series Civil Construction in late 1918, thanks to the cooperation of the Drukar publishing house in Kyiv and J. Orenstein's Galician Invoice in Kolomyia: a wooden Karaite shul in Lutsk (Fedosiuk, 2008, p. 32), a drive-in in Felshtyn (**Fig. 3**), and a stone synagogue in Sataniv (1532). The building of the latter, as well as the fortress synagogues in Shargorod (1589) and Husiatyn (early seventeenth century) (CP Kopylov), demonstrated the invincibility of their walls combined with the originality of their architectural style.

There were few photographers and publishers of illustrated postcards on either side of the Russian-Austrian border who visualized Jewish neighbourhoods in cities, towns, or shtetls in Galicia, Podolia, and Volhynia. Exceptions included cases where the Jewish buildings were located along the boundary of one of the perimeters of the marketplace (Zhvanets, Medzhybizh, Nemyriv), near-religious or public buildings (Iziaslav, Kamianets-Podilskiy, Starokonstantyniv). These rare views of documentary postcards allow us to form an idea of the Jewish architecture of the frontier.

The Jews in the central neighbourhoods of cities and towns had shops in front of their homes to attract passers-by, or they sold directly from open windows or doors. Their homes could combine the functions of a city store and a village warehouse. In several places, a room on the ground floor of a Jewish house could serve as an inn, shop, or craft workshop. In particular, Dovha Street in Kamianets-Podilskiy, which was featured on several postcards by local publishers (Kopylov, & Paur, 2019, pp. 178–179), was almost entirely occupied by the Jewish shops and workshops that were hospitably open to customers.

The typical architecture of a two-story Jewish house with galleries and a barn is depicted on a postcard with a reproduction of the painting *Victim of Fanaticism* (1899) by Ukrainian artist M. Pymonenko (**Fig. 8**). To paint this picture, the author travelled to Kremenets, where he made many drawings and sketches of the city's landscapes and types of Jewish population. At the very same time, the depicted the lynching of a Jewish girl by an angry crowd who fell in love with a Ukrainian blacksmith and converted to Christianity demonstrated the vulnerability of the Jewish family to internal and external conflicts, which foreshadowed the decline of the Jewish town.

The way of life and everyday practices that had been developed over the years determined the ability of Jews to organize leisure time at a convenient time, using a variety of reasons. A common pastime for residents of Zalishchyky, Zhvanets, Kamianka, Mohyliv-Podilskiy, Stara Ushytsia, Yampil, and the others as well as residents of Kamianets-Podilskiy, Skala, Chortkiv on its tributaries the Smotrych, Zbruch, Seret rivers, was, as can be seen on the postcard images, watching the river flow, the passage of ships, their maneuvering near the marinas, rafting on the Carpathian fir trees, etc. Communication between participants of such entertainment became more lively when the participants were neighbours, usually representatives of the same ethnic group.



**Fig. 8. Mykola Pymonenko “Victim of Fanaticism” (1899)**

*(Pimonenko “Zhertva fanatizma” [1912])*

In Kamianets-Podilskyi, a favourite place for entertainment and leisure for Jewish children from the Jerusalemka neighbourhood in the Old Town was the banks of the Smotrych River near the footbridge between its banks. The moment of this children’s play was captured in the postcard “On the Banks of the Smotrych River” published by Jewish businessman H. Spizman (CP Kopylov). In shtetls or small towns such Jews met in the streets, near shops, or in market squares in their free time to exchange news and discuss everyday affairs. Such everyday practices were usually captured by photographers, but these photos were “overlooked” by postcard publishers, who took into consideration the censorship restrictions in place. Non-verbal communication was also significant among the Jewish residents of urban settlements. Fishing was a common activity for the Jews, and it took place in the Horyna, Dniester, Zbruch, Sluch, Smotrych and other rivers. Photographers captured individual fishermen and groups of them, and these photographs were used to create documentary postcards showcasing the region (CP Paur).

In the largest cities of the Russian frontier, such as Vinnytsia, Zalishchyky, Kamianets-Podilskyi, Lutsk, Mohyliv-Podilskyi, Proskuriv, and Rivne, the beautification of city squares, boulevards, streets, and parks created new entertainment opportunities. In Kamianets-Podilskyi, a favourite leisure activity of wealthy citizens, including wealthy Jews, was visiting the shops located on Central Square, Troitska and Poshtova streets; in Lutsk, on Shoseyna Street; in Rivne, on Holovna Shoseyna Street; in Proskuriv, on Kamianetska and Oleksandrivska streets, which was usually recorded by photographers and postcard publishers. The Jewish families lived in the central streets of the towns, and their dwellings were used as shops, warehouses, or workshops (Fedosiuk, 2008, p. 21; Pryscheпа, 2010, p. 195; CP Kopylov).

The most well-known event of 1904 in the life of the Hasidic communities of Northern Bukovyna and the adjacent regions of Podillia was the wedding of the daughter of a legendary Rabbi Friedman of Sadhory. This event was reported in the secular chronicle by most of the Austrian newspaper writers, and one of the publishers of postcards in Chernivtsi did not ignore it (**Fig. 9**). He skilfully conveyed the national spirit and the solemn atmosphere of the

wedding ceremony as the bride and groom performed the ceremony under the wedding canopy after reading the marriage contract, and the guests were eager to have fun and rejoice with the Friedman family (The Open Door, 2002, p. 43). The guests, especially Jewish women, wore brightly coloured dresses or skirts, fashionable short jackets, wrapped silk scarves and jewellery made of pearls and precious stones. The wives of the wealthiest merchants wore diamonds and other jewellery, while the wives of middle-class tradespeople could boast of necklaces made of silver ducats or corals on silk thread. The wedding was boisterous and surprisingly joyful, a striking contrast to the dreary black and grey everyday life of ordinary Jews on the Austro-Russian border.



**Fig. 9. Wedding of the Daughter of the Rabbi Friedman of Sadhory**  
(*Slub. Chype-Maseltow "Nakladem E. Schiller", Czernowce, [1904]*)

The life of Jewish communities on the Right Bank of Ukraine was influenced by anti-Semitism imposed from Western Europe, whose proponents rejected coexistence with the Jews in any form. Violent acts of anti-Semitic attitudes by the population and the military led to spontaneous riots that took place. The pogroms were economically motivated and caused by political instability, and were accompanied by the destruction of property, looting, abuse of the individual, and sometimes even the death of people (Reient, & Serdiuk, 2021, p. 93). Mass violence against the Jews was received differently by the public: some sympathised with the perpetrators and approved of their actions, while others condemned the violence and sympathised with the victims. Some publishers reacted to the tragic events by printing black-and-white postcards with drawings by the Jewish artists M. Maimon "In the Motherland" and K. Filkovich "Pogrom" condemning the riots. However, no postcards with postal stamps were found, indicating that they were probably banned from being used for mailing. As a result of the violent acts, 240,000 Jews emigrated to North America alone in 1906 – 1907.

With the outbreak of World War I, most of the countries at war banned the sending of letters in postal envelopes, and all written messages were sent to addressees only on open correspondence cards. The military authorities were added to the list of publishers of postal correspondence forms, and the subject matter of postcard images was propagandistic. In the

German-occupied areas of Volyn province, postcards were printed for German soldiers with the inscription “Feldpostkarte” (German for “field post letter”), which depicted views of cities, types of residents, episodes of their routine, etc. The replication of similar scenes indicated the successes of the Kaiser’s army, attracted the attention of recipients, and introduced them to a little-known country. In particular, a postcard sent by field post on 25 November 1917 to E. Bork in Berlin-Mariendorf depicts a group of middle-aged and older Jewish men in the Kamen-Kashirsky market square (Fedosiuk, 2008, p. 163).

In another postcard from the same period, the German publisher emphasised the view of the Jewish quarter in Volodymyr-Volynskyi (CP Kopylova). Its buildings were a kind of space where the natural agricultural cycle coexisted with the economic system of urban civilisation. Nearly every house in this quarter was a symbiosis of a city dwelling and a village house with an attached barn and shed, as Jews involved in city crafts and trade kept livestock and poultry. The houses of wealthy Jews were more similar to standard urban buildings, while those of the poor were more similar to rural huts. At the same time, the postcard of the Korps Hofman charitable foundation for the Austrian army included a black-and-white graphic drawing by the great Hungarian avant-garde artist of Jewish origin Bertalan Pora of the seventeenth-century stone defensive synagogue in Pidhaitsi, several neighbouring mud houses from the Jewish quarter, and six harnessed carts (CP Kopylov). The story depicted by the master showed that during the tumultuous years of the First World War, members of the Jewish community of the city, overcoming all sorts of difficulties and obstacles, continued their established economic and everyday practices: They traded in shops and on the market, worked in craft workshops, followed a set of religious observances and the Sabbath, attended synagogues, etc., which was confirmed by a series of German postcards from the occupation period with a view of the Great Synagogue in Volodymyr-Volynskyi and the bustling life around it (CP Paur).

**Conclusions.** The postcards from the late 19th and early 20th centuries serve as crucial visual sources. Their significance lies in their reliability in characterizing the societal worldview, their social orientation, and the mass democratic nature of this channel of interpersonal communication, which establishes a connection with the life world of people from the past.

The iconography of these postcards reflects the daily visual world of the Jewish population in the Russian-Austrian borderland and serves as testimonies of their lives. This opens possibilities for studying their culture, economic activities, and everyday practices. The images on these postcards confirm that the synagogue was the center of the Jewish life in the borderlands and that religious rituals held the highest authority, applicable to all members of the communities. The absolute authority of rabbis is evidenced by their portraits and views of their residences, depicted on postcards by Austrian, Jewish, and Polish publishers.

These documentary postcards bear witness to the significant role of Jewish entrepreneurs in developing the economies of the Habsburg and Romanov empires’ borderlands, extending into neighboring regions. The series of images depict the economic activities of Jewish capital in the sugar, flour milling, woodworking, brick and tile industries of the Russian border provinces. These activities contributed to the completion of the industrial revolution in the regions of the Russian-Austrian borderland – Volyn, Podillya, Bukovina, and Eastern Galicia. This development facilitated the growth of transport infrastructure, accelerated urbanization processes, and led to a numerical predominance of Jews among the inhabitants of urban settlements on the borderlands of the two empires.

The depictions on these postcards capture the national color, leisure activities, household scenes, traditional dress, and everyday practices of Jewish community members. They confirm the influence and leadership of men within the family, even though women often made key decisions, ensured adherence to Jewish principles, and fulfilled daily needs. These postcards also document that those who sought to break free from family and community traditions were often ostracized.

Due to anti-Semitism and persecution, the Jewish population of the western provinces emigrated to the American continents. Yet, several postcards from World War I era depict that even during turbulent times, members of the Jewish community in cities continued their established economic and everyday practices, overcoming various difficulties and obstacles.

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**THE “FORGOTTEN” REGION IN THE “FORGOTTEN WAR”:  
RIGHT-BANK CHERKASY REGION IN 1914 – 1917**

**Abstract.** *The purpose of this article is to reconstruct the everyday life of the urban population of Right-Bank Cherkasy region during World War I, with an emphasis on identifying general Ukrainian trends characteristic of that period, as well as specific local features determined by the socio-economic and geographical characteristics of the region. The methodology of the research is based on an interdisciplinary approach that combines historiographical analysis, everyday history, and regional context. In the study historical and comparative, statistical, and typological methods have been used. The scientific novelty consists in the fact that it is the first comprehensive study of the region’s cities history in the context of World War I. Conclusions. The analysis of Right-Bank Cherkasy region population’s everyday life during World War I (1914 – 1917) shows how even a rear region far from the front became an integral part of the global conflict, while retaining its local specificity. At the beginning of the war, there were mass patriotic actions, mobilization, and volunteer activity in the cities*

and towns. Over time, enthusiasm gave way to panic, apathy, distrust of the authorities and the official press, and growing corruption. Mobilization caused labour shortage, which led to the involvement of marginalized groups in the workforce, including foreign prisoners of war, prisoners, and even arrested illegal prostitutes, while the wives of conscripted men went to work en masse. Food shortages, inflation, and interethnic tensions deepened the material and moral psychological crisis. Military priorities and a new economic situation caused by the war made it impossible to implement important infrastructure projects, in particular the construction of a sewage system in Cherkasy and the launch of tram service in Uman. All this testifies to profound social transformations which, despite the region's "obscurity" in historiography, reflected nationwide processes and were precursors to the revolutionary events of 1917.

**Key words:** Right-Bank Cherkasy Region, World War I, cities, everyday life, Cherkasy, Uman.

### **“ЗАБУТИЙ” РЕГІОН У “ЗАБУТІЙ ВІЙНІ”: ПРАВОБЕРЕЖНА ЧЕРКАЩИНА В 1914 – 1917 рр.**

**Анотація.** Метою статті є реконструкція повсякденного життя міського населення Правобережної Черкащини в період Першої світової війни, з акцентом на виявлення загальноукраїнських тенденцій, характерних для тієї доби, а також специфічних локальних рис, зумовлених соціально-економічними та географічними особливостями регіону. **Методологія** базується на міждисциплінарному підході, що поєднує історіографічний аналіз, повсякденну історію та регіональний контекст. У дослідженні використано історико-порівняльний, статистичний, типологічний методи. **Наукова новизна** полягає у тому, що це перше комплексне дослідження історії міст регіону в контексті Першої світової війни. **Висновки.** Аналіз повсякденного життя населення Правобережної Черкащини в роки Першої світової війни (1914 – 1917 рр.) показує, як навіть віддалений від фронту тилловий регіон став невід’ємною частиною глобального конфлікту, зберігаючи при цьому локальну специфіку. На початку війни в містах спостерігалися масові патріотичні акції, проводили мобілізованих і волонтерська активність. Згодом ентузіазм змінився панікою, апатією, недовірою до влади і офіційної преси та зростанням корупції. Мобілізація спричинила дефіцит робочої сили, через що до праці залучали маргіналізовані групи – іноземних військовополонених, ув’язнених і навіть, арештованих нелегальних повій, а дружини призваних чоловіків масово виходили на роботу. Порушення продовольчого балансу, інфляція та міжсетнічна напруга поглиблювали матеріальну та водночас морально-психологічну кризу. Військові пріоритети та нова, породжена війною, економічна кон’юнктура унеможливили реалізацію важливих інфраструктурних проєктів, зокрема будівництва каналізації у Черкасах і запуску трамвайного руху в Умані. Усе це свідчить про глибокі соціальні трансформації, які, попри “забутість” регіону в історіографії, стали відображенням загальноукраїнських процесів і передумовами революційних подій 1917 р.

**Ключові слова:** Правобережна Черкащина, Перша світова війна, міста, повсякденність, Черкаси, Умань.

**Problem Statement.** Conceptualizing World War I as a temporal and spatial abstraction enables us to interpret it as a large-scale historical event that covers a certain period and geographical space, realized through specific local contexts. Thus, any location, such as Right-Bank Cherkasy region, is an organic part of this abstraction, since it not only reflects the general features of the war era, but also makes a unique contribution to its understanding. (The term “Right Bank Cherkasy region”, despite its retrospective nature, is quite justified in the research context, as it refers to the counties of Kyiv province that covered the territory of modern Cherkasy region: Zvenyhorod, Kaniv, Uman, Cherkasy and Chyhyryn and were located on the right bank of the Dnieper – Aut.).

Starting from August 1914, Right-Bank Cherkasy region, although located more than 300 km from the main hostilities in Galicia and Western Volyn, played a significant role in the logistics of the Russian Imperial Army. The region was involved in supporting the war

economy actively, accepting refugees and providing medical care to wounded soldiers. That is why, the war had a particularly significant impact on the lives of urban population: in cities its consequences were more noticeable, concentrated and socially tangible. According to the classical approach, the level of tension of the “rear front” was determined by the ability of society to ensure economic and psychological stability in the face of growing antagonism between the two fundamental challenges of wartime – the need to satisfy external (military support) and internal (civilian) needs simultaneously. We will analyze this issue through the prism of everyday life.

**Review of Recent Research and Publications.** The basis of the source database is made up of unpublished documents of the Central State Historical Archive (Kyiv), the State Archive of Kyiv Region, the State Archive of Cherkasy Region, as well as materials from the daily newspapers of Right-Bank Ukraine of the period under analysis – “Golos Umani”, “Kiev”, “Kievlianin”, “Kievskaya Mysl”, “Provintsialny Golos”, “Yugo-Zapadny Krai” and “Yuzhnaya Kopeika”.

In modern historiography, the concept of the “forgotten war” concerning the global conflict of 1914 – 1918 is used in various contexts. For example, in the United States, this “forgetfulness” is explained by the fact that World War I was displaced from collective memory by the events of World War II, which had a much larger scale and consequences for American society, in particular in terms of losses on the battlefield (Keene, 2016; Kelly, 2021). In Europe, in this context, they talk about the Eastern Front, which is not so deeply rooted in European historical consciousness, as it is overshadowed by the subsequent experience of World War II and the policy of historical heritage in the region (Cornwall, 2023; Zalewska, & Kiarszys, 2021).

In the Ukrainian scientific discourse, World War I has remained a “forgotten” issue for a long time, which is due to the predominant focus of researchers on the events of the revolution of 1917 – 1921, as well as the influence of Soviet historiography, which either silenced or ideologically distorted the history of the so-called “First Imperialist War”. Only since the beginning of the 21st century there has been a gradual growth of interest in this period, which was reflected, in particular, in the publication of a thorough monograph by Oleksandr Reient and Oleksandr Serdiuk “World War I and Ukraine” (Reient, & Serdiuk, 2004), and also in the research by Oksana Vilshanska on the everyday life of the Ukrainian population during the war (Vilshanska, 2004). Despite the overall positive dynamics in the development of Ukrainian historiography of World War I, in the regional context it is of a distinctly uneven nature. In particular, Right-Bank Cherkasy region still remains understudied and, in fact, “forgotten” in historical studies on the local dimension of the Great War. This situation is obviously due to a number of factors – primarily the geographical distance of the region from the front line, as well as the absence of large urban centres, which usually served as centres of intense political and social life, which traditionally is in the focus of researchers. That is why, the analysis of the historiography of the issue concerns exclusively general studies. In the context of our study, a representative manifestation of the Soviet approach to covering the events of World War I is the multi-volume general publication “History of Towns and Villages of the Ukrainian SSR”, one of the volumes of which focuses on Cherkasy region (Tronko, 1972). The war is mentioned superficially in this study, with an emphasis on the “growth of the revolutionary consciousness of the working people” and preparation for future socialist transformations. This approach effectively devalued the social and everyday aspects of the life of the region’s population during the war years, replacing them with class rhetoric and ideological clichés.

In modern Ukrainian historiography, the chief focus is on the study of the leading centres of the region – Uman and Cherkasy. The emphasis on the development of Uman on the eve of World War I is especially noticeable. Thus, in particular, in his study Serhiy Vasiliev characterized the city as “one of the most developed socio-economic centres of Kyiv province” (Vasiliev, 2011, p. 43). Such an evaluation is important for our research, as it enables us to better understand how the war affected the urban infrastructure and social space of Uman. In the research by Tetiana Kuznets (Kuznets, 2022), using the example of the history of Uman Meyendorff family, the mobilization of local student youth into the ranks of the Russian army in 1914 is mentioned, which gives an idea of the initial moods and reaction of the local population to the war outbreak. The everyday life of the inhabitants of Cherkasy and Cherkasy region in general during World War I is indirectly reflected in the collective monograph “Cherkashchyna: History of Land and its Population” (Masnenko, & Polishchuk, 2017), and also in the studies by Vasyl Melnychenko (Melnychenko, 2002; Melnychenko, 2023). They focus on the analysis of mobilization processes, the activities of local charitable organizations, and problems with providing the population with food. World War I is mentioned in local history studies on the history of Zvenyhorodka (Biletskyi, 2003) and Kaniv briefly (Burenko, 2018).

**The purpose** of the article is to reconstruct the everyday life of the urban population of Right-Bank Cherkasy region during the World War I, with an emphasis on identifying all-Ukrainian trends characteristic of that era, as well as specific local features determined by the socio-economic and geographical features of the region.

**Research Results.** In 1914, Right Bank Cherkasy region covered the territory of five counties with a total area of 18.2 thousand km<sup>2</sup> (Kyeviskyi gubernskiyi statisticheskyi komitet, 1914, p. 39), which was only slightly inferior to the size of modern Cherkasy region – 20.9 thousand km<sup>2</sup>. (Vermenych, 2013). The total urban population was 148 thousand people. It was distributed among the towns as follows: Zvenyhorodka – 27 thousand, Kaniv – 13.2 thousand, Uman – 44.4 thousand, Cherkasy – 42.8 thousand, Chyhyryn – 20.5 thousand (Tsentral'nyi statisticheskii komitet M.V.D., 1915, p. 37).

Like other Ukrainian cities, the outbreak of war on August 1, 1914, changed the rhythm of everyday life. Advertisements were posted on the city streets of Right-Bank Cherkasy region demanding that conscripts report to military mobilization centres – the so-called “military presences”. The city was quickly filled with mobilized people from the towns and surrounding villages. It is known that in Cherkasy, the city government held a series of solemn prayers and patriotic events, which included calls for self-sacrifice in the “name of the tsar and the fatherland”. The local leader of the Cadet Party, Ivan Zvinsky, for his part, organized meetings with young people and delivered emotional speeches about the “sacred duty” of citizens, with calls to take up arms to defend the Russian Empire (Melnychenko, 2023, p. 188). The same war narratives were disseminated through the press. Although the propaganda machine was activated almost immediately after the declaration of war, a significant part of the population apparently did not accept its messages as convincing or logically based. The slogans disseminated at that time remained largely abstract and far from the real experiences of the majority of the population. That is why, the patriotic enthusiasm that the crowds on the streets of the region could outwardly demonstrate was more an emotional, even shock reaction to the very fact of the war outbreak than the result of a conscious acceptance of ideological rhetoric.

The ambivalence of the townspeople’s mood (a combination of enthusiasm and fear) was accompanied by the same ambiguity of the mobilization process. On the one hand, the

press testified to its success. In particular, the issue of the newspaper “Kievlianin” dated August 7, 1914 noted that in Zvenyhorodka the mobilization took place “in a perfect order”: numerous conscripts arrived in the town, from where they went to the front in an organized manner, singing patriotic songs and appealing to the mayor with a request to take care of their families. The city mayor, on the other hand, initiated a large-scale demonstration of several thousand people to provide a moral support to the mobilized (Zvenigorodka, 1914, p. 3). The so-called “spirit of 1914” also affected representatives of the upper social strata. With the outbreak of the war, Yuriy Meyendorff, the head of Uman district zemstvo, who was simultaneously receiving secondary education and, therefore, had the right to a deferment from military service, voluntarily mobilized into the army (Kuznets, 2022, p. 34).

On the other hand, as the war dragged on, fewer and fewer people wanted to go to the front. Archival materials indicate widespread corruption in the “military presences”, whose employees made significant profits from the growing number of people trying to evade mobilization. One of these officials, in 1914 – 1916, using his official position, managed to earn tens of thousands of rubles and build two stone houses in Uman (Central State Historical Archives of Ukraine, Kyiv, f. 274, d. 4, c. 6240, p. 55). The mood of both mobilized and potential conscripts deteriorated significantly under the influence of alarming news from the front. In particular, in the summer of 1915, after the defeat of the Russian army as a result of the Horlytsky breakthrough carried out by the Austro-German troops, Uman resident Leon Morgulis, known for his palmistry sessions, began to agitate soldiers and officers to surrender in order “to end the war more quickly” (CSHAUK, f. 274, d. 1, c. 3570, p. 4). Given his field of activity, such behaviour could have been a manifestation of pacifism, a deliberate provocation, or a commercial venture that went beyond the limits of what was permissible and was duly “evaluated” by local law enforcement in the form of an arrest.

Obviously, this also indicated that the unsuccessful summer campaign of the Russian army in 1915, presented by official propaganda as “The Great Retreat”, through informal channels of communication formed an alternative image of war in the public consciousness – different from the official one significantly. The growing distrust of the population towards the newspapers of that time was both cause and consequence. Back on February 12, 1915, Agatangel Krymsky, while in Zvenyhorodka, wrote in a letter to Volodymyr Vernadsky that the press of that time was unrecognizable – “it lied to itself” (Vernadskyi, 2012, p. 319). In the autumn of the same year, the logical consequence of these processes was panic among the townspeople of the region, which, despite the stabilization achieved by the Russian troops at the front, was affected by the chain reaction of fear of occupation that had begun in Podillia and Volyn. A typical response to this illusory threat was the hasty departure of residents to the eastern provinces of the empire (Gerasymov, & Romanyuk, 2024, p. 140). This was reported, in particular, by the Uman correspondent of the newspaper “Kievlianin” (Uman, 1915, p. 3).

In the first months of the war, the illusions about its quick end, which, in fact, were the basis of the initial optimism, began to disappear in society. The protracted nature of the military conflict with unprecedented human losses forced both the authorities and the public to respond quickly to the medical needs of the army. In 1914, a network of hospitals and infirmaries for wounded soldiers and officers was deployed in all towns of the region. In Cherkasy, about ten infirmaries operated. These institutions were maintained at the expense of military departments and charitable contributions, and were located mainly in the vacated premises of educational institutions. Senior students of the Cherkasy gymnasium for men formed a medical unit of 70 people, who helped transport the wounded from the station

and provided assistance to doctors. Volunteer activity was widespread – committees and societies were established to help the wounded and civilians (Melnychenko, 2023, p. 190). It is noteworthy that the desire to help wounded servicemen sometimes prevailed even over personal aversion to war. A striking example is Uman resident Nadiya Surovtseva, who, despite her own pacifist beliefs and sympathy for Austria-Hungary, immediately after the arrival of the first echelons of wounded soldiers in the city, enrolled in a course for nurses of mercy. For the 18-year-old girl, political views lost meaning when she first saw the physical and mental torment of crippled soldiers, especially those who suffered severe psychological trauma in the war (Kryvosheia, 2014, p. 118).

In 1915, a new socially vulnerable category of the population appeared in the towns of the region – refugees, who needed both material and moral support. The problem of their resettlement and food provision became of a paramount importance. In Kaniv, Cherkasy, Zvenyhorodka and Uman, hospitals and free canteens were established for refugees. Since state resources were not enough to fully meet the needs of refugees, significant support was provided to them by public charitable organizations (Melnychenko, 2023, p. 191).

Mass mobilization gradually depleted the region's labour resources. Under the conditions of conscription of men of working professions to the war, the authorities had to look for alternative labour force. One of such sources was prisoners of war, mostly from Austria-Hungary. They, for example, worked at the Cherkasy brick factory. Some of them were paid more than 50 kopecks per day (State archive of Cherkasy region, f. 8, d.1, c. 708, p. 155) – quite a good amount according to the standards of the time. It is also known that in 1916 prisoners of war were actively involved in defense work in the region – in particular, in the construction of trenches and dugouts (Tronko, 1972, c. 100). This was done on the orders of the Russian military command, which, in the context of the summer offensive campaign, set certain strategic goals in the rear area. It is significant that in the same year Uman district police chief instructed his subordinates to send detained prostitutes to similar jobs. Apparently, in this way they fought two problems at once – the shortage of workers and the spread of illegal prostitution (Borba s taynoy prostitutsiey i... okopy, 1916, p. 4).

The shortage of male labour caused by mobilization directly affected another important microsocial problem – the temporary absence or loss of a breadwinner in a family. This microsocial problem, in turn, led to an increase in social and family demand for female labour. Responding to new needs, in April of 1916, the Cherkasy City Duma decided to establish three kindergartens in the city and its suburbs to care for 500 children whose mothers were forced to provide for their families on their own (g. Cherkassy, 1916a, p. 4).

However, the money earned did not always allow to feed the family properly. Two main problems caused by the war stood in the way: rising prices and commodity shortages. In this context, it is important to consider another specific feature of the region under analysis – its ethnic structure. The majority of the cities of Right-Bank Cherkasy region were characterized by an unusually high representation of the Ukrainians, which, in particular, distinguished it from Volyn and Podillia. According to the 1897 census, the Ukrainians made up two-thirds of the urban population in Kaniv and Chyhyryn, and slightly less than half in Zvenyhorodka and Cherkasy. The only exception was Uman, where the Jewish community was numerically dominant: 57.1% compared to 30.66% of the Ukrainians (Chornyi, 2001, p. 12).

The presented statistical data enable us to better understand the origins of the problem of regulating trade on weekends and holidays, which arose in a number of cities at the beginning of World War I (Gerasymov, 2017, p. 202). The intensification of trade activities during wartime

led to aggravation of relations between the Jewish communities and local authorities. The severity of conflicts depended on a numerical ratio of the Jewish population: if the community did not constitute the majority, its influence on trade was limited, which determined the level of tension in relations with municipalities and the corresponding economic consequences. Both Jews and Orthodox Christians observed a ban on trade on their holidays: the former – on Saturday, the latter – on Sunday. The prerequisites for this arose after the adoption of the government decree “On Normal Rest of Employees in Commercial Establishments” in 1908, drawn up in accordance with Christian canons. However, its implementation depended on the decisions of local authorities. For example, nine days before the war outbreak, Chyhyryn Town Council adopted a mandatory resolution according to which trade in taverns and beer pubs was allowed only on weekdays from 8:00 to 20:00, while on holidays (solemn) and Sundays it was completely prohibited (State Archive of Kyiv Region, f. 9, d. 30, c. 97, p. 2). Despite some attempts by Chyhyryn Jews to make the authorities reverse this decision, it did not have a significant impact on the local economy. In contrast, for example, the situation was different in Lypovets, where the Jewish community, having a larger representation, played a more important role in the commercial life of the town. The decision of the local authorities was even harsher and was probably motivated by anti-Semitic sentiments. It spread to the entire sphere of trade, which ultimately affected not only the Jewish entrepreneurs, but also the very town: residents of surrounding villages stopped coming to Lypovets for the purpose of trade, concluding deals, and receiving services. As a result, economic activity shifted to neighbouring settlements, where similar restrictions were not applied (SAKR, f. 9, d. 30, c. 92, p. 70). Thus, trade issues, like the food problem in general, could take on a distinct interethnic colour.

It should be noted that food problems in the towns of the region were exacerbated by typical reasons at that time: labour mobilization, requisitions, transport disruptions, the influx of refugees, inflation, and poorly organized supply. In 1915, a number of essential goods fell into the category of scarce. In this regard, townspeople rightly had questions that sooner or later had to go beyond the food sphere. For example, in the autumn of that year, the residents of Zvenyhorodka could not understand why there was so little sugar in the town and it cost 22 kopecks per pound, when so many sugar factories operated in the neighbourhood (SAKR, f. 9, d. 31, c. 17, p. 203).

To overcome the food crisis, the townspeople and local authorities used various methods. One of them may be considered a real socio-economic phenomenon of that era. It was about school gardening. It is worth noting that the garden squads established on the initiative of the authorities required minimal funding, since the work was usually organized near the place of residence, and this reduced transportation costs or made them impossible. Children worked in shifts (3–5 hours), which reduced the cost of their food. Both boys and girls were sent to the fields and gardens. One of such sites, for example, was called “Garden of Labour Brigade of the Cherkasy First Higher Primary School in Memory of Great Patriotic War II”. (*One of the contemporary names of World War I in the Russian Empire. – Aut.*). The harvest collected by the schoolchildren was to be given free of charge to the families of front-line soldiers (SAKR, f. 9, d. 32, c. 24, p. 187). It should be noted that during wartime, the educational process in Cherkasy took place in two shifts. This was due to the fact that part of the buildings of city educational institutions was transferred for the needs of the army by the local authorities. This necessitated the rental of additional premises for the accommodation of students in dormitories, as well as for the organization of education in new classrooms (CSHAUK, f. 707, d. 258, c. 9, pp. 391–393).

As in any war, altruism and self-sacrifice of some people coexisted with selfishness, corruption, looting and social indifference of others. This fact was evidenced, in particular, by the unprecedented growth of bank deposits. During only two years of the war, the turnover of funds in one of the financial institutions of Cherkasy increased by 2–2.5 times. It did

not at all indicate an improvement in the well-being of the townspeople: the majority of the deposited amounts were of a dubious origin, often associated with semi-legal or openly criminal schemes (Po nashemu krayu, 1916, p. 4). Such social – and no less importantly, moral – inequality only increased tension in the society and led to destabilization of the rear, which ultimately contributed to the political explosion of 1917.

Another manifestation of wartime in the sphere of consumption was the so-called “dry law” introduced by the tsarist authorities – a ban on the sale of alcoholic beverages. In the Russian Empire, the final decisions on restricting the trade in alcohol were entrusted to local authorities. Thus, the responsibility for the implementation of this unpopular measure was actually transferred from the centre to the localities. By the end of 1914, the sale of alcoholic beverages was banned in Cherkasy and Uman (SAKR, f. 9, d. 32, c. 24, p. 259). The effects of the anti-alcohol campaign initiated by St. Petersburg were controversial. On the one hand, the introduction of the so-called “dry law” contributed to a decrease in crime rates, suicides and domestic violence (Gerasyimov, 2017, pp. 230–231). However, on the other hand, there were also negative consequences.

Firstly, the city budget revenues decreased, as a significant portion of revenues came from the tavern tax. Due to the ban on the sale of alcohol, many public catering establishments became unprofitable and were forced to close. For example, in Uman, profitability of restaurants after the ban on the sale of alcoholic beverages decreased tenfold (SAKR, f. 9, d. 31, c. 23, p. 169).

Secondly, the drinking population instinctively sought alternative opportunities to obtain alcoholic beverages. Newspapers of the time repeatedly published cases of the establishment of illegal moonshine brewing places. For example, in March 1916, Uman law enforcement officers discovered a “distillery”, which was regularly moved from one apartment to another, usually in opposite parts of the town, which served as a means of masking illegal activities. The manufactured products were sold at a price of 100 rubles per bucket (g. Uman, 1916, p. 2).

The introduction of “dry law” also caused the emergence of the so-called “vacuum of leisure”: deprived of free access to alcohol, some of the townspeople began to look for alternative forms of spending their free time. This, in turn, contributed to the growth of the popularity of cultural and leisure institutions – theatres, cinemas, libraries. In Cherkasy, as in other regions of Ukraine, there was a real book craze (Gerasyimov, 2017, p. 254). This fact is evidenced by the growth in the number of subscribers to the Cherkasy City Library: if in January 1915 there were 435 subscribers, then in January 1916 there were 553 subscribers (SAKR, f. 9, d. 32, c. 24, p. 343).

The arrival of mobilized soldiers, and later, influx of refugees brought sanitary and hygienic problems to the fore in the cities and towns of Right-Bank Cherkasy region. On August 23, 1914, Kyiv, Podillia, and Volyn Governor-General Fiodor Trepov issued a mandatory decree that obliged owners of residential buildings, as well as administrations of state, zemstvo, city, and public institutions to maintain proper sanitary conditions. In particular, it was forbidden to throw manure, pour sewage, slops and dirty factory water into the streets, ravines, rivers, ditches and other places not intended for this. At the same time, each household had to have special boxes or pits for collecting solid and liquid waste, which had to be cleaned regularly (CSHAUK, f. 442, d. 864, c. 246, p. 45). However, implementation of the authorities’ demands for improving the sanitary situation took place under conditions of limited local resources. Thus, in Uman, the expenses for urban improvement in the budget for 1914 were reduced by 4,237 rubles 37 kopecks. This was the result of an order from the provincial presence, which obliged to double the expenses for maintaining the police – from 8 to 16 thousand rubles (SAKR, f. 9, d. 30, c. 76, p. 12). In addition, the city suffered from the unsatisfactory quality of its water supply. The city’s water supply, built on the eve of the war, was pumped from a polluted swampy area, as a result of which a consumer received a yellowish-brown liquid with a putrid smell. Despite all remarks of the provincial sanitary executive commission, the concessionaires were in no hurry to correct their mistake (Bez zdorovoy vody, 1915, p. 4).

At the end of 1914, a significant congestion of the shopping and market square was recorded in Kaniv due to a shortage of janitors. The archival source we rely on does not explain the reasons for the shortage of municipal workers, but it can be assumed that this was due either to their mobilization into the army or, less likely, to insufficient material incentives for this work. That is why, the square remained uncleaned until it was swept by one of the workers randomly hired by the town authorities. As a way out of the situation, Kaniv town council considered the possibility of an agreement with the local prison department to involve prisoners in performing such work (SAKR, f. 9, d. 31, c. 18, p. 11).

Unexpectedly, in the spring of 1916, Cherkasy got a chance to build a sewage system, which would improve the sanitary condition of the city significantly. In February of that year, the military authorities demanded that the garbage dumps be moved away from the nearby sanitary and medical town. In response, the city council instructed the mayor to appeal to the government with a request to allocate 150 thousand rubles from the state treasury for the construction of a sewage system. Unexpectedly for many, this request was granted. The sewerage project was prepared by Professor Dmytro Ruzsky, and the city authorities undertook to complete the construction by October 1, 1916. If successful, Cherkasy would become the second city in Right-Bank Ukraine, after Kyiv, with its own city sewerage system. However, the implementation of this plan was prevented by the military: in April, the commander-in-chief of the armies of the Southwestern Front refused to confirm the funding due to a shortage of manpower and materials, as well as doubts about meeting the construction deadlines (SAKR, f. 9, d. 30, c. 76, pp. 148, 44). This case illustrates the complexity of the rear functioning in wartime, when even the most necessary sanitary initiatives of local authorities could be neglected or blocked due to the priority of military needs and decisions of the military command.

The beginning of the war was marked by a major epidemiological threat to the region. In the summer and autumn of 1914, the cholera pathogen spread from Podillia to Uman district, causing mass illnesses among the local population (Likvidatsiya holernoy epidemii, 1914, p. 2). The inhabitants of Uman were seriously concerned about the invasion of rodents and sick dogs arriving from the neighboring Podillia province. These animals posed a real threat to life and health, as they were carriers of dangerous infectious diseases – plague, typhus and rabies. The mass reproduction of mice and rats was probably explained by the presence of significant grain reserves intended for the needs of the Russian army, while their appearance in cities was due to the intensive movement of troops and refugees, which disrupted the natural balance and drove them out of the fields. In turn, the increase in the number of dogs in urban spaces was associated with the arrival of peasants who accompanied their animals when taking products to markets, where the demand for provisions increased sharply at the beginning of the war (Nashestvie myishey, 1914, p. 2). Given the chronic lack of funding and the mobilization of some medical and sanitary personnel, Uman authorities had limited opportunities to counter these challenges effectively. In October 1915, the situation even reached a critical point, when the town faced the risk of a sharp deterioration in medical services due to the possible termination of night medical duty (Po provintsii, 1915, p. 4).

Overall, the problems of urban infrastructure during World War I were not limited to financial and skilled shortages. They were broader and included organizational difficulties, repressive measures against subjects of enemy states, and the consequences of socio-economic destabilization under wartime conditions.

Sequestration – the temporary seizure, freezing, or confiscation of property, funds, or resources by decision of the authorities and, at the same time, a popular tool of political or administrative pressure at the time – often had a destructive effect on the development of public order. In Zvenyhorodka, this process led to a peculiar situation. On March 11, 1915, at a meeting of the town council, the decision was made to punish the concessionaire of the local

power plant, Fedir Vysotsky, for unauthorized laying of an electric cable. An aggravating circumstance was not only his Austrian citizenship, but also the fact that his son had served in the Austro-Hungarian army. The service became the basis for unanimous support for the decision to sequester the enterprise and submit a corresponding petition to Kyiv Military District. Although the military authorities granted this request soon, in May it became clear that there was practically nothing to transfer to the town – the entrepreneur turned out to be a chronic debtor (SAKR, f. 9, d. 31, c. 17, p. 68). Therefore, on the eve of the sequestration, all the power plant equipment – engines, dynamo-machines and other technical means – was first taken out of the town, and later, due to debt obligations, officially written off and sold at public auction (SAKR, f. 9, d. 31, c. 97, p. 34).

We may say that World War I began at an extremely unfortunate moment for Uman, since it thereby destroyed the previously established local authorities' strategy for the development of urban development. On July 6, 1914, in accordance with the previously reached agreement with the concessionaires, the town conducted tests of the newly built power plant. However, this meant only partial fulfillment of the agreement terms (*Elektricheskoe osveschenie*, 1914, p. 3) – after the completion of electrification, it was planned to launch tram traffic in the town no later than the end of 1914 (*Doklad po voprosu ob ustroystve elektricheskogo osvescheniya i tramvaya*, 1914, pp. 2–3) – an extremely important issue in the context of the rapid pre-war development of Uman. It is worth noting that by the set deadline, construction work in the town was almost completed: tracks were laid, an engine was installed at the central station, etc. The only thing missing were wires and rolling stock, which remained at the factory in the Belgian city of Charleroi after the war outbreak. Due to impossibility of obtaining carriages from the manufacturer, an alternative was considered – to deliver them from Yelyzavethrad, Katerynoslav, Kyiv or Kremenchuk. Therefore, it was initially decided to postpone the opening of the tramway until the spring of 1915 (Uman, 1914, p. 4). However, due to the failure to implement this alternative scheme, “The Electricity Society” appealed to the city authorities with a request to postpone the launch of the tram service until the end of hostilities. The city council refused to grant this request categorically (*Hodataystvo o sekvestre elektricheskogo predpriyatiya*, 1916, p. 5), thereby laying the groundwork for the legal conflict that erupted in 1915.

We assume that the catalyst for the worsening of relations may have been, to some extent, the exchange crisis that unfolded in the Ukrainian lands at the beginning of the second year of the war. Its essence was the rapid disappearance of small exchange coins from circulation: made of copper, which was scarce at the time, this money had a higher material value than its face value, which made its accumulation a profitable activity. As a result, this caused chaos in the sphere of trade and household services. Uman cabmen, remaining monopolists of passenger transportation due to the lack of a tram, were among those who brilliantly took advantage of the situation. They arbitrarily increased fares, citing a shortage of small coins, and refused to give out change (Uman, 1915, p. 3).

Thus, at the end of 1915, a conflict arose between the Uman City Duma and the local electricity producer due to the failure to fulfill the agreement to launch the tram service by December 1914. In response to a lawsuit, the company threatened to completely cut off the city's electricity supply. The Duma's petition to the head of the Kyiv Military District to sequester the enterprise and transfer its property to the city was rejected due to the lack of evidence of its Austro-Hungarian or German “trace” (*Hodataystvo o sekvestre elektricheskogo predpriyatiya*, 1916, p. 5). At the same time, the Uman authorities decided to finally terminate the agreement with the concessionaires (SAKR, f. 9, d. 33, c. 23, p. 12), which, as it turned out, put an end to the prospect of launching a city tram service.

However, a more typical problem of that time in the energy supply of cities was the economy militarization, which prioritized satisfying the needs of the army. Due to the

use of railway transport for military purposes, city power plants faced an acute shortage of fuel necessary for their operation. For example, on April 27, 1916, this caused another stoppage of electricity production in Cherkasy. The stoppage affected both city residents, who were forced to move through darkened streets, and water consumers, because due to the unsatisfactory sanitary condition of the Dnieper, only the city water supply provided a stable supply of clean water (g. Cherkassy, 1916b, p. 3).

The solution to the fuel crisis of that time was seen in the use of alternative energy sources. In May 1916, the Commissioner for Mineral Fuels sent orders to the regions to replace coal with “any substitutes in accordance with local conditions – firewood, straw, peat, sunflower husks, etc.” (Nedostatok uglya, 1916, p. 3). An interesting coincidence is that it was during those days that the Cherkasy City Duma received a petition from an inventor Yaroslav Kuznetsov requesting permission to build a briquette plant for producing fuel from household and commercial waste. Despite the obvious promise of the project (it was planned to produce 1–1.5 million poods of fuel per year), its implementation required significant investments – about 50 thousand rubles. Therefore, Cherkasy city authorities were forced to state the impossibility of implementing the initiative of the local inventor (SACHR, f. 8, d. 1, c. 509, p. 5).

**Conclusions.** The analysis of the population’s daily life in Right-Bank Cherkasy region during World War I (1914 – 1917) shows how even a rear region remote from the front became an integral part of the global conflict, while maintaining local specificity. At the beginning of the war, mass patriotic actions, farewells of mobilized people and volunteer activity were observed in the cities. Over time, enthusiasm was replaced by panic, apathy, distrust of the authorities and official press, and the growth of corruption. Mobilization caused a shortage of labour, which led to the recruitment of marginalized groups – foreign prisoners of war, prisoners and even arrested illegal prostitutes, while the wives of conscripted men went out to work en masse. Food shortages, inflation and interethnic tension deepened material and at the same time moral and psychological crisis. Military priorities and a new economic situation caused by the war made it impossible to implement important infrastructure projects, in particular, the construction of a sewage system in Cherkasy and the launch of tram traffic in Uman. All this testifies to deep social transformations, which, despite the “forgetfulness” of the region in historiography, became a reflection of all-Ukrainian processes and prerequisites for the revolutionary events of 1917.

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## **TERRITORIAL-BORDER ISSUES IN THE SOUTH CAUCASUS DURING THE SOVIET ERA**

**Abstract. Research Purpose.** *The study of the emergence and evolution of territorial and border problems in the South Caucasus during the Soviet period is of a particular relevance today. Considering that the roots of modern territorial conflicts in the South Caucasus originate from the political processes that took place in the early twentieth century, the main purpose of the research is to analyse the historical background of these disputes, to examine the policy of border formation during the Soviet era, and to assess the impact of this policy on the contemporary situation in the region. Research Methodology.* *The study is based on frontier theory, which interprets borders not simply as fixed geographical lines but as dynamic political and administrative constructs shaped by power relations, security strategies, and processes of identity formation. From this perspective, a border is not merely a geographical concept; it is also a socio-political phenomenon closely connected with the construction of national identity, the preservation of collective memory, and the formation of historical and political narratives. Following Etienne Balibar's conceptualization of borders as politically constructed and dispersed spaces rather than fixed territorial lines, this study interprets Soviet border-making in the South Caucasus as a dynamic process shaped by power relations and identity politics. Within the Soviet context, borders in the South Caucasus operated as flexible frontier zones that were repeatedly modified through administrative restructuring and political intervention. The research employs historiographical and comparative analysis, systematisation of archival materials, identification of*

cause-and-effect relationships in political decision-making, analytical generalisation, and spatial and temporal evaluation. Various archival documents, official decrees, and ideological approaches of the Soviet period are examined in order to reveal the mechanisms of Soviet national policy and border formation. **The scientific novelty** lies in the application of frontier theory to reinterpret Soviet border-making policies in the South Caucasus as a dynamic and politically constructed process, supported by newly introduced archival materials. The study systematically reveals the influence of the “temporary” nature of borders after the incorporation of the South Caucasus republics into the Soviet Union, frequent border changes and population relocations on the political map and ethnodemographic structure of the region. The scientific novelty lies in the fact that the transformation of borders in the South Caucasus during the Soviet era is analysed for the first time through a comprehensive approach, combining political decisions, archival materials, ethnic factors, territorial claims, administrative subordination and regional strategies. The research proves that the deliberate maintenance of instability in borders served as a mechanism for deepening tensions among the republics, strengthening political dependence and contributing to the formation of long-term conflicts that continue to this day. **Conclusions.** The results show that the borders within the USSR in the South Caucasus were not formed on ethnic, historical or legal principles, which made them unstable and turned them into a subject of territorial dispute after the collapse of the Soviet empire. The consequences of Soviet national and border policies are considered one of the main causes of ongoing conflicts in the region. Therefore, the scientific analysis of current developments, the study of historical experience and the objective evaluation of past political decisions remain essential for understanding the contemporary geopolitical processes in the South Caucasus.

**Key words:** South Caucasus, Soviet Empire, regional conflicts, administrative-territorial division, territorial-border issues, national interests, disputed territories.

## ТЕРИТОРІАЛЬНО-КОРДОННІ ПИТАННЯ НА ПІВДЕННОМУ КАВКАЗІ У РАДЯНСЬКУ ДОБУ

**Анотація. Мета дослідження.** Вивчення виникнення та еволюції територіально-кордонних проблем на Південному Кавказі в радянський період є надзвичайно актуальним сьогодні. З огляду на те, що коріння сучасних територіальних конфліктів на Південному Кавказі походить від політичних процесів, які відбувалися на початку XX ст., основна мета дослідження полягає в аналізі історичних витоків цих суперечок, вивченні політики формування кордонів у радянську добу та оцінці впливу цієї політики на сучасну ситуацію в регіоні. **Методологія дослідження.** Дослідження ґрунтується на теорії фронтиру, яка трактує кордони не лише як фіксовані географічні лінії, але й як динамічні політичні та адміністративні конструкції, сформовані під впливом владних відносин, безпекових стратегій і процесів формування ідентичності. З цієї перспективи кордон є не тільки географічною категорією, але й соціально-політичним феноменом, тісно пов'язаним із конструюванням національної ідентичності, збереженням колективної пам'яті та формуванням історичних і політичних наративів. Спираючись на концептуалізацію кордонів Етьєна Балібара як політично сконструйованих і просторово розосереджених утворень, а не фіксованих територіальних ліній, у дослідженні радянське формування кордонів на Південному Кавказі інтерпретується як динамічний процес, зумовлений владними відносинами та політикою ідентичності. У радянському контексті кордони Південного Кавказу функціонували як гнучкі прикордонні зони, що неодноразово змінювалися внаслідок адміністративних реформ і політичного втручання. У роботі застосовано історіографічний і порівняльний аналіз, систематизацію архівних матеріалів, виявлення причинно-наслідкових зв'язків у процесі прийняття політичних рішень, аналітичне узагальнення та просторово-часову оцінку. Різноманітні архівні документи, офіційні декрети й ідеологічні підходи радянського періоду проаналізовано з метою розкриття механізмів радянської національної політики та формування кордонів. **Наукова новизна.** Наукова новизна дослідження полягає у застосуванні теорії фронтиру для переосмислення радянської політики формування кордонів на Південному Кавказі як динамічного та політично сконструйованого процесу, підтверженого введенням до наукового обігу нових архівних матеріалів. У роботі системно розкрито вплив “тимчасового” характеру кордонів після включення республік Південного Кавказу до складу Радянського Союзу, а також частих змін меж

*і переселення населення на політичну карту та етнодемографічну структуру регіону. Новизна дослідження також полягає у тому, що трансформація кордонів Південного Кавказу в радянський період уперше проаналізована на основі комплексного підходу, який поєднує вивчення політичних рішень, архівних матеріалів, етнічних чинників, територіальних претензій, адміністративного підпорядкування та регіональних стратегій. Дослідження доводить, що свідоме підтримання нестабільності кордонів виступало механізмом поглиблення напруженості між республіками, посилення їхньої політичної залежності та сприяло формуванню довготривалих конфліктів, наслідки яких зберігаються й донині. **Висновки.** Результати показують, що кордони всередині СРСР на Південному Кавказі не формувалися на етнічних, історичних чи правових засадах, через що вони залишалися нестабільними і після розпаду радянської імперії перетворилися на предмет територіальних суперечок. Наслідки радянської національної та кордонної політики вважаються однією з головних причин нинішніх конфліктів у регіоні. Тому науковий аналіз сучасних процесів, вивчення історичного досвіду та об'єктивне оцінювання минулих політичних рішень залишаються необхідними для розуміння сучасних геополітичних процесів на Південному Кавказі.*

**Ключові слова:** Південний Кавказ; Радянська імперія; регіональні конфлікти; адміністративно-територіальний поділ; територіально-кордонні питання; національні інтереси; спірні території.

**Problem Statement.** Since the 19th century, border and territorial issues in the South Caucasus have constituted one of the key geopolitical problems of the region. The resettlement policy of the Tsarist Russian Empire, the contentious delimitation of borders in 1918 – 1920, and the administrative and territorial reforms carried out during the Soviet period laid the foundation for contemporary conflicts. After the collapse of the USSR, the transformation of former administrative boundaries into state borders resulted in armed clashes such as the Armenia–Azerbaijan conflict as well as the Abkhazia and South Ossetia crises in Georgia. Today, the unfinished processes of border delimitation and demarcation between regional states and Armenia’s continued territorial claims against Azerbaijan and Georgia further aggravate the security environment. This situation necessitates scholarly research into the historical foundations of border formation in the South Caucasus, the essence of Soviet border policy, and its modern geopolitical implications.

**The purpose of the article** is to provide a scholarly analysis of the historical origins of border and territorial issues in the South Caucasus, to reveal the essence of the Soviet border policy, and to assess the impact of this policy on contemporary political and security realities.

**Review of Recent Research and Publications.** In the course of the research, both local and foreign scholarly works on the formation of border and territorial policies in the South Caucasus were examined. The studies by Azerbaijani historians – I. Huseynova (Hüseynova, 2004; 2008; 2018), I. Niftaliyev (Niftaliyev, 2010), S. Mustafayeva (Mustafayeva, 2017), R. Mustafazade (Mustafazade, 2006) and Sh. Rahmanzade – provided an important theoretical and methodological basis for understanding the essence of Soviet border delimitation, the regulation of interethnic relations, and the administrative governance system of the USSR. Particularly, R. S. Mustafazade’s “*Two Republics. Azerbaijan–Russia Relations (1918–1922)*”, I. V. Niftaliyev’s “*The Azerbaijan SSR in the Expansionist Plans of Armenians (1920s)*”, S.O. Mustafayeva’s “*Changes of Borders and Territories in the South Caucasus (1917–1922)*” monograph on border policy in the Caucasus, constitute essential academic sources for this study. Furthermore, the works of Western scholars – including Shireen Hunter, Etienne Balibar, James Mankoff, and Ronald Grigor Suny were examined to analyse the ideological foundations of Soviet national policy and its long-term impact on ethnic conflicts in the South Caucasus. As Shireen T. Hunter notes, Soviet territorial and nationalities policies often resulted in the creation

of administrative units that did not fully correspond to ethnic realities, thereby contributing to long-term instability in the region (Hunter, 2006, p. 113). Some Armenian authors have offered alternative interpretations regarding the geographical delimitation of the South Caucasus. For example, A.K. Shahinyan argues that the southern boundaries of the region were historically shaped by imperial political decisions and associated with the broader concept of the “Armenian Highlands” (Shahinyan, 2022, p. 420). However, the formation of regional borders in the South Caucasus was determined not only by physical geography but also by administrative restructuring and imperial strategic interests, which often overlooked the historical and ethnopolitical realities of the region. The historiographical comparison demonstrates that a comprehensive and systematic analysis of the geopolitical consequences of border formation in the South Caucasus remains highly relevant.

In contrast to earlier studies that concentrated on specific bilateral territorial interactions in the South Caucasus, the present article adopts a comprehensive regional-comparative framework and examines Soviet border-making policies across the South Caucasus as a whole. The analysis moves beyond bilateral perspectives and employs frontier theory to conceptualize administrative-territorial transformations as a dynamic and politically constructed process. In addition, the study incorporates newly examined archival documents and primary sources that were not utilized in the author’s previous publication, thereby expanding the empirical foundation of the research.

**Purpose of the research** is to analyse the historical background of modern territorial conflicts in the South Caucasus, to examine the policy of border formation during the Soviet era, and to assess the impact of this policy on the contemporary situation in the region.

**Research Results.** In the history of all states and peoples, problems related to borders and territories are considered one of the most important issues. This problem is of scientific and political interest in our time in the South Caucasus. The urgency of the problem of the formation of interstate borders in the South Caucasus region is due to the presence of border issues and territorial conflicts, which have not yet been resolved. After the collapse of the Russian and Soviet empires, the peoples of the South Caucasus were able to establish their independence twice in the 20th century. The fall of the Russian Empire and the emergence of independent states on the political map of the region in both periods of the collapse of the USSR strengthened the territorial claims of Armenia to Azerbaijan and Georgia. Border problems arose, leading to bloody conflicts in Karabakh, South Ossetia and Abkhazia. In modern times, the delimitation and demarcation of borders between the sovereign republics of the South Caucasus has not yet been fully completed. This issue requires studying the problems associated with the history of the formation of interstate borders in the South Caucasus region.

In Soviet times, the emergence of territorial-border problems in the South Caucasus is an important issue for the study of evolution in many aspects. The roots of territorial-border problems in the South Caucasus were associated with the policy of tsarism. After the declaration of independence of Georgia, Azerbaijan and Armenia in 1918, territorial-border issues arose sharply (Nəсібзадə, 1989). One of the reasons for the territorial-border problems was the artificial creation of a state for the Armenians who were brought to the region as a result of the resettlement policy of tsarism. Since it was difficult to determine the borders between these states based on the administrative territories of the former governorates, ethnographic, and natural boundaries, all the meetings held ended without results. In later periods, the Armenian-Georgian war and the aggression of Armenia against Azerbaijan took

place. The states of the South Caucasus were occupied by Soviet Russia in 1920 – 1921, and after the establishment of Soviet power between the republics in 1918 – 1920, borders were temporarily established. However, territorial-border issues have not been fundamentally resolved. The territory between states was considered not as a border line, but, on the contrary, as part of the system of the future territorial-administrative division of the proposed state of the USSR. In the first months of Soviet power, the Armenian-Georgian-Russian class played a dominant role in the party leadership of Azerbaijan. Under the name of the Soviet regime, an anti-Azerbaijani policy was carried out mainly, the national interests of the population were not taken into account. This was more clearly manifested in the policy of deprivation of property, confiscation, resolution of territorial disputes. Such a policy would lead to anti-Soviet uprisings in Ganja, Karabakh, Zagatala and other areas. The claims of Dashnak Armenia and Menshevik Georgia to some territories that were an integral part of Soviet Azerbaijan further aggravated the hostile situation in this region. On June 8, 1920, G. K. Ordzhonikidze, allegedly pointing to these “controversial” issues, wrote in a telegram to V. I. Lenin and I. V. Stalin: “Do not consider these issues as issues worth paying attention to, so the counter-revolution speculates with them” (*Azərbaycan tarixi*, 2008, p. 40). In a telegram, V.I. Lenin wrote: “Remind me to talk about this with Chicherin.” There is also a note by I.V. Stalin on the telegram: “He has already discussed” (*Azərbaycan tarixi*, 2008, p. 41).

The Kars Treaty, signed on October 13, 1921, settled the territorial-border issues of Turkey with the republics of the South Caucasus. Nevertheless, instead of resolving disputes between the three republics, the Central Soviet Government created autonomous institutions in its territories in order to make Azerbaijan and Georgia dependent on themselves and prevent their separation (Mustafazade, 2006, p. 194). At the same time, the ancient lands of Azerbaijan were transferred to Armenia by decisions taken in different years. Due to the policy of frequent border changes and population relocation on the eve of the collapse of the USSR, from an ethnic, historical and legal point of view, the borders within the empire were not stable. It is for this reason that the collapse of the multinational Soviet empire turned these borders into a matter of dispute. The conflicts that continue so far are considered the result of this policy and make the study of this problem relevant.

Historical facts prove that the total area of Transcaucasian Seim, created in February 1918, was 210,000 square kilometers. 45,000 square kilometers of this territory were transferred to Ottoman Turkey under the terms of the Brest-Litovsk (March 1918) and Batumi (June 1918) treaties. With the decision adopted by the National Council of the Azerbaijan Democratic Republic (ADR) on May 29, 1918, a 9,000 square kilometer area, including the city of Iravan, was ceded to the Armenians. 100.6 thousand square kilometers were allocated to the Azerbaijan Democratic Republic, and 55.4 thousand square kilometers were assigned to Georgia (*AXC Ensiklopediyası*, 2004 – 2005, p. 149). In general, starting from May 28, 1918, especially in 1920 – 1929, Azerbaijani lands were “included in the Armenian SSR”.

After the formation of the Soviet Federative Socialist Republic of the South Caucasus (Transcaucasia) in 1922, new administrative-territorial changes were carried out due to the inconsistency of the administrative-territorial division existing in this territory with new political and economic requirements. Soviet Russia pursued a policy of creating complex economic regions in the South Caucasus region and artificially equalizing the economic opportunities of the republics, provided that they were fully subordinate to the Baku oil region. The main principles of the administrative-territorial division were the decentralization of industries, the laying of the core of a single future Soviet culture by achieving maximum

convergence of national cultures, ensuring the resettlement of the population in territories close to industrial points, studying the directions and nature of communication lines, determining the number and national structure of the population. In the border demarcation policy carried out by Moscow in the South Caucasus, the primary consideration was the economic interests of Soviet Russia. The national interests of the region's population were not taken into account. The idea of the superiority of national interests in the policy of Soviet Russia and the "concern" of the state for the economic well-being of the peoples of the South Caucasus was purposefully promoted in the public consciousness. On August 15, 1921, the Caucasian Bureau of the Central Committee of the RCP (b), having heard the question of the borders between the Soviet republics of the South Caucasus, turned to the chairmen of the Soviets of People's Commissars of these republics and the chairmen of the Revolutionary committees of the Azerbaijan SSR, the Armenian SSR and the Georgian SSR (Hüseynova, 2018, p. 755). It said here that an agreement defining the borders should be signed between these three republics. However, the signing of such a general agreement did not take place.

On August 22, 1922, signed by the chairman of the Extraordinary Commission of the South Caucasus, the Extraordinary Commissions of the Azerbaijan SSR, the Georgian SSR and the Armenian SSR were ordered to abolish border posts, guards and checkpoints within 24 hours from that moment. According to this order, the external borders were already considered the borders of Turkey and Iran, and the borders between the republics of the South Caucasus, formed in 1918 – 1920, have actually lost their significance. In June 1921, at the Plenum of the Caucasian Bureau of the RCP (b), a decision was made on the free access of the population engaged in cattle breeding in the republics of the South Caucasus to pastures. According to this decision, the peasants of the South Caucasian republics engaged in cattle breeding received the right to move freely within the limits determined by the decision. The adoption of this decision led to a number of misunderstandings and conflicts between the Azerbaijani and Armenian populations living in the border areas of the South Caucasian republics. To resolve these controversial issues in December 1922, a special commission of the Central Committee of the RCP (b) of the South Caucasus was created under the leadership of N. Narimanov, S. Ordzhonikidze and Myasnikov. According to the certificate on the territory of the Azerbaijan SSR submitted to the Secretariat for Foreign Affairs of the People's Land Commissariat of the Azerbaijan SSR on October 25, 1922, the entire territory of the Azerbaijan SSR is 7,989,105 desyatins (1 desyatyna = 1.09 hectares) (ARSA, f. 379, d. 3, c. 73, pp. 135–136).

According to the agreement reached between the three countries, 379,984 desyatins (4,151 square kilometers) from the former Kazakh district of Azerbaijan were ceded to Armenia, 405,000 desyatins (4,424 square kilometers) from the former Zangezour district were also given to Armenia, and 79,600 desyatins (869 square kilometers) from the former Tbilisi district were transferred to Azerbaijan. In 1922, Azerbaijan lost 784,984 desyatins of its 7,989,105 desyatins of land (379,984; 405,000), gaining only 79,600 desyatins in return. This amounted to a total of 7,283,721 desyatins (79,577 square kilometers) (Mustafayeva, 2017, pp. 180–181).

The undisputed territory of the Azerbaijan SSR with Armenia passed through the old administrative borders of the Gazakh and Borchali regions, from the Gazakh region to the Maral mountains with the Alexandropolsky and Novo-Bayazit regions. From there it descends directly to Lake Geicha, passes 2 versts (1 versta = 1.0668 km) east of the village of Chubuglu. Then it divided Lake Goycha into half and moved along its southern shore in

a westerly direction. On the southern shore of Lake Goycha, the border started between the villages of Zaqali and Godekbulaq, then passed by the villages of Yarnizli, Qizil Veng, and Yuxari Alcali, moving through the mountainous region of the southern shore of Lake Goycha towards Qizil Xaraba, the elevation point of 10,859 metres, and the elevation of Agmahan. It continued westward to Mount Small Agdag, reaching the border of the Iravan and Yeni Bayazid districts, separating the mountainous regions inhabited by Azerbaijanis from the shores occupied by Armenian villages. Then the border extended from Mount Small Agdag first in a northwestern direction towards Lake Toghman, then westward towards the village of Tezekend. From there, it followed the Gerni River towards the village of Yuxari Agbash, ascending five versts (approximately 5.3 kilometers) northward to the elevation point of 3,620, from there, it proceeded southwest towards Uluxanlı, then to the Araz River, and finally moved northward from the village of Rençber. From the village of Rençber, the border went directly west along the Araz River, following the former administrative borders of the Surmalı and Echmiadzin districts and the Kars province, reaching the Tendurek Mountains along the former Russian-Turkish border (Baxşəliyev, 2022). The requirements given for the preparation of the report on Azerbaijani territories hinted at the secret intentions of the Soviet leadership.

Border disputes between the Azerbaijan SSR and certain regions of the Armenian SSR in most cases were resolved in favor of the Armenian side. In this regard, there are numerous facts. Between the village of II Shikhli of the Gazakh region of the Azerbaijan SSR and the village of Gulp of the Dilijan region of the Armenian SSR, the disputed area of 940 hectares was given to the village of Chomche. The territory of Karachol between the village of Kotkend of the Dilijan region of the Armenian SSR and the village of Dashsalakhli of the Gazakh region of the Azerbaijan SSR with an area of 700 hectares was transferred to the village of Kotkend of the Armenian SSR. Between the village of Lelekend of the Dilijan region of the Armenian SSR and the village of Chakhmali of the Gazakh region of the MSSR, a disputed area of 69 hectares remained behind the village of Lelekend of the Azerbaijan SSR. The territory of “Gunesh”, which is the territory of 753 desyatins (8.2 km<sup>2</sup>) between the villages of Ashagi Gizilbulag, Norashen, Moseskend, Dilijan region of the Armenian SSR and the villages of Qacali and Alibeyli, Gazakh region of the Azerbaijan SSR, by the decision of the Land Commission of the South Caucasus CEC (Central Executive Committee) of November 8, 1924, they were divided into two parts. The Dilijan region of the Armenian SSR included a land plot of 4,000 desyatins (43.7 km<sup>2</sup>) in the Shinikh-Ayrim region of the Gazakh region of the Azerbaijan SSR (Baxşəliyev, 2022). Additionally, the issue of the villages of Berkhudarli, Soflu, and Yukhari Eskipara in the Gazakh district, with a total area of 3,104 desyatins and a population of 577 people, remaining within the Dilijan district was also a matter of dispute. It was revealed that this villages, which were part of the administrative boundaries of the Gazakh district (Ganja region), were separated from it by a narrow strip of land. At a meeting of the local commission of the Central Committee of the South Caucasus, held July 19–20, 1929, it was decided that the expedient form of solution to the liquidation of the strip line was to include all three villages in the Dilijan region. By order of the CEC, the village of Guney-Kheyrimli (100 houses) of the Dilijan region was annexed to the small village of Kheyrimli of the Gazakh region (26 houses) and became part of the Dilijan region of the Armenian SSR. As a result of this decision, 50 percent of the population of the Gazakh district was deprived of their summer pastures. In general, as follows from the report of the Land Commission of the Ministry of Internal Affairs of the Azerbaijan SSR in 1928 on border

disputes with neighboring republics of the South Caucasian Federation, the Armenian SSR was granted 75,904 desyatins (829.2 km<sup>2</sup>) of fertile land and 79,208 desyatins (865.3 km<sup>2</sup>) of “unsuitable” land (Baxşəliyev, 2022).

In early 1921, a special commission was created to prepare a draft administrative division of the Azerbaijan SSR. The new division was to be established based on the project of the commission operating under the People’s Commissariat of the Military Commission. In the “Explanatory note to the draft administrative-territorial division of the Azerbaijan Socialist Soviet Republic” it was proposed to divide the Zangezur region into two regions, since “the specified region is a vast territory through which mountain hills and deep valleys pass and which is completely impassable in winter” (ARSASPD, f. 609, d. 1, c. 2, pp. 97–98). From the administrative center of the district it is difficult, even impossible to manage. By dividing the district from south to north, it will be ensured that each newly formed county includes farmland, forests, and pastures, the population composition will be mixed Armenian and Muslim so that solidarity can be fostered. As a result, the working people of both peoples will become stronger, which is very important. Given that the bulk of the Kurdish population lives in this part, it seems more expedient to divide the west of this region into Zangezur district and the east into two parts called Kurdistan district (Mustafayeva, 2017, p. 169). This proposal regarding the Zangezur region was designed to gradually separate part of the region from Azerbaijan. To prepare a draft of a new administrative division, a special Interdepartmental Commission of the Azerbaijan Temporary Revolution Committee was created, chaired by T. Chikalo. The first meeting of this commission took place on March 12, 1921. At a meeting held on April 2, when discussing the issue of dividing the Zangezur region into two parts, members of the commission Shimanovsky and Hajiyev opposed the division and noted the economic unity of the region. In this regard, the commission decided to leave the Zangezur region unchanged in the old administrative borders. After that, Armenians began to systematically settle in the western part of Zangezur, the local Azerbaijani population was driven out and even forcibly expelled from their territories. The occupation of the western part of Zangezur in July 1921 and its incorporation into the Armenian SSR, along with the administrative changes made to determine the borders of the artificial Armenian autonomy in the mountainous part of Karabakh, further escalated the situation between the lands of the Zangezur district that were given to Armenia and the various regions of the Karabakh area of the Azerbaijan SSR regarding the determination of borders between the two republics (ARSSA, f. 1, d. 31, c. 186a, p. 26). These territorial disputes were never resolved in favor of Azerbaijan. In 1929, the southwestern part of Zangezur was annexed to Armenia (Niftaliyev, 2010, p. 62). The separation of Zangezur from the main part of the country served only one purpose: to prevent direct contacts between Turkey and other Turkic peoples in the East. As a result of the accession of most of Zangezur to Armenia, the Nakhchivan region was isolated from the main part of Azerbaijan.

According to the report of the head of the land administration of the Shusha district of Rogozin dated July 26, 1923, when resolving the border dispute between the cattle-breeding population of Zangezur and Shusha districts, 20 pastures were transferred to Zangezur district to prevent armed conflict between the parties. There were also unfounded claims to the Alagol summer pastures located on the border of the Kurdistan district of the Azerbaijan SSR and the Dereleyez and Novo-Bayazit districts of the Armenian SSR, around Lake Alagol, with an area of about 12 thousand desyatins (131.1 km<sup>2</sup>). In 1923, the leadership of the Armenian SSR raised the issue of including these territories into the Novo-Bayazit district.

On June 23, 1926, the Central Executive Committee of the Armenian SSR in a telegram to the chairman of the Central Executive Committee of the Azerbaijan SSR reported that back in 1921 the Alagoller pasture area of 13170 desyatins (143.8 km<sup>2</sup>) was transferred to the Dereleyez district (Baxşəliyev, 2022). On July 5, 1926, the Secretariat of the Presidium of the CEC of the Azerbaijan SSR informed the Secretariat of the CEC of the Armenian SSR that it should submit a decision on when the decision of the CEC of the South Caucasus was made to transfer the pastures of the Alagol region to the Dereleyez region. Although this request was repeated on December 25, 1926 by the Secretariat of the Central Committee of the Azerbaijan SSR, the Secretariat of the Central Committee of the Armenian SSR did not give any answer.

Historical facts prove that several villages of the Nakhchivan Autonomous Republic were also included in the Armenian SSR. So, according to the Kars Treaty, the Armenian SSR officially recognized the autonomy of Nakhchivan as part of the Azerbaijan SSR, but did not abandon its hated intentions. By the decision of the CEC of the South Caucasus of February 18, 1929, the villages of Horadiz, Qurdqulaq, Aghbin, Khachik, Aghach, Almali, Daghalmali, Itgiran, Sultanbey, the adjacent watersheds and pastures to the village of Garchivan, as well as part of the lands of the village of Garchivan and Kilid of the Ordubad region, and by the decision dated March 5, 1938 – the villages of Sadarak and Karki, part of the land around the villages of the Sharur region was transferred to Soviet Armenia (Baxşəliyev, 2022). The total area of these territories was 658.4 km<sup>2</sup>. As a result, from January 1, 1933, the total area of the Nakhchivan Autonomous Soviet Socialist Republic was 5.329.6 km<sup>2</sup>.

These decisions meant a gross violation of the terms of the Moscow and Kars treaties on the status and borders of the Nakhchivan MSSR. The territorial and administrative changes that arose within the borders between the Azerbaijan SSR and the Armenian SSR after the inclusion of the South Caucasus in the USSR were violated without taking into account the historical natural borders and conditions of Azerbaijan, and the direct intervention of the USSR ensured the expansion of the borders of the Armenian SSR due to the collapse of Azerbaijani lands. The fulfillment of unfounded claims against Azerbaijan throughout history has further distorted Armenians. The fulfillment of these requirements created real opportunities for the realization of Armenian dreams of creating a “Great Armenia”. In subsequent periods, Armenians continued these hateful intentions.

Since the 1980s, the socio-political situation in the Caucasus region increasingly shifted from cooperation toward confrontation. Ethnic and territorial disputes, as well as confessional and geopolitical contradictions, became defining features of the regional landscape (Hüseynova, 2008, p. 102). During the late Soviet period, debates surrounding the status of the Nagorno-Karabakh Autonomous Oblast (NKAO) intensified in the context of broader political transformations under M. S. Gorbachev. In his speech at the plenum of the Central Committee of the Communist Party of the Soviet Union in April 1989, Heydar Aliyev analyzed the socio-economic development of the NKAO and responded to various claims raised in this regard (Hüseynova, 2004, p. 102). Furthermore, in 1945, 1956, 1962, 1967, 1972, 1977 and 1987, the leadership of the Armenian SSR raised the question of transferring the Armenian-populated mountainous part of the Karabakh region from the Azerbaijan SSR to the Armenian SSR. These demands were rejected within the existing Soviet constitutional framework. At the same time, as Shireen T. Hunter notes, Soviet territorial and nationalities policies in Nagorno-Karabakh did not eliminate structural tensions but rather institutionalized contradictions that later escalated into open conflict (Hunter, 2006, p. 116).

**Conclusion.** Regional conflicts, which are one of the most important problems of our time, arise directly or indirectly, on the basis of a conflict of interests of two or more countries, due to the presence of territorial claims between them. Since 1988, Armenians had argued that the declaration of Nagorno-Karabakh as an autonomous part of Azerbaijan is a “historical mistake,” believing that the Moscow and Kars treaties had lost force. Without any legal and historical grounds, they made territorial claims against Karabakh and Nakhchivan. Armenian claims were not limited to the territories of Azerbaijan, Armenians made territorial claims to almost the entire South Caucasus. As a result of the Armenian-Azerbaijani Karabakh conflict, one of the most tragic conflicts in the history of the 20th century, Azerbaijanis were displaced from their ancestral lands. Armenia took advantage of the internal instability in Azerbaijan and as a result of the occupation of the Nagorno-Karabakh Autonomous Region (territory of 4388 km<sup>2</sup>) and adjacent areas, a mass of more than 1 million refugees and internally displaced persons was formed, as a result of the destruction of the only transport road connecting Nakhchivan with Azerbaijan, the territory of Nakhchivan separated from Azerbaijan. The 44-day war, which began on September 27, 2020 with another violation of the ceasefire by Armenia and a counterattack by the Azerbaijani army, ended with the victory of Azerbaijan. The absence of a statement on the status of Nagorno-Karabakh in the trilateral statement on ending the war, signed by the President of the Republic of Azerbaijan, the President of Russian Federation and the Prime Minister of Armenia on November 10, 2020, is a glorious victory for the Azerbaijan Army. The construction of new transport links connecting Nakhchivan and the western regions of Azerbaijan is a historic step towards connecting the territory of the Nakhchivan Autonomous Republic with the main part of Azerbaijan by land roads. After the war, the Armenian side refused negotiations every time, continued its armed provocations in our sovereign territories. In 2021, working groups on border delimitation were created in Azerbaijan and Armenia, and negotiations were accompanied by periodic armed clashes in the region. In November 2021 and September 2022, armed clashes took place at the border. In March 2023, illegal Armenian armed formations deployed in Karabakh committed provocations in the direction of Shusha, in April and May the positions of the Azerbaijan Army in the direction of the conditional state border were fired upon. On September 19, after the Armenian armed forces committed a number of large-scale military provocations and terrorist attacks in the Karabakh region of Azerbaijan, in order to prevent them, ensure the implementation of the provisions of the Trilateral Declaration, and restore the Constitutional System of the Republic of Azerbaijan in the region, a local anti-terrorist operation was launched. In just 23 hours 43 minutes, the Armenian separatists were defeated. Taking into account the appeal of representatives of the Armenian residents of Karabakh through the Russian peacekeeping contingent, on September 20, 2023 at 13:00, anti-terrorist measures of a local nature were suspended and an agreement was reached on a complete ceasefire. According to the agreement, the Armenian armed forces, illegal Armenian armed formations deployed in the Karabakh region of the Republic of Azerbaijan, must leave combat positions and military posts and be completely disarmed (Ministry of Defence of the Republic of Azerbaijan. Official website).

The persistence of frozen conflicts in Georgia, one of the other states of the South Caucasus region, creates security problems, hindering the development of the region. There are conflicts such as Abkhazia and South Ossetia in the region. In these conflicts, the Armenians living in Georgia fought against Georgia on the separatist side. The Armenian population living in the Armenian-directed Samtskhe-Javakheti provokes riots from time to time, and Armenia considers

Samtskhe-Javakheti to be part of the fictitious “Great Armenia”. It can be concluded that as early as the 19th century, during the administrative and territorial division carried out by the Tsarist government in the South Caucasus region, historical, ethnographic and geographical features and realities of the region were not taken into account, which led to the emergence of many ethnopolitical and ethnosocial disagreements. With the advent of new states in the South Caucasus, the former administrative borders became state, but during the establishment and subsequent existence of Soviet power, territorial-border problems were not completely resolved. It is these issues that underlie the problem of the formation of interstate borders in the South Caucasus in modern times. Recent policy analyses highlight that the persistence of unresolved conflicts in the South Caucasus remains a central factor affecting regional stability and external engagement in the post-Soviet space (Rumer, Sokolsky, & Stronski, 2017, pp. 3–4).

The current strategic landscape of the South Caucasus illustrates that the territorial arrangements established during the Soviet era continue to shape patterns of regional interaction and political stability (Mankoff, 2024, p. 13). Contemporary assessments emphasize the region’s renewed strategic relevance, particularly in terms of connectivity and geopolitical positioning. These developments highlight that Soviet administrative-territorial restructuring produced long-term structural effects that extend far beyond the historical period in which they were created.

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**WOMEN'S MOVEMENT IN GALICIA IN THE 1920s – 1930s:  
HOW UKRAINIAN WOMEN BRIDGED THE CIVILIZATIONAL DIVIDE  
BETWEEN CITY AND COUNTRYSIDE**

**Abstract.** *The purpose of the study is to elucidate the women's movement in Galicia, focusing on its efforts to expand women's rights and improve the cultural, socio-economic, and living conditions of the Ukrainian women. A chief focus is on the issue of the way the movement helped bridge the civilizational gap between the urban and rural everyday life of the Ukrainian women. Therefore, the study highlights the communication channels that fostered connections between women who lived in urban and rural areas (e.g., participation in women's organizations, vocational training courses, summer "vacation" trips, and employment in cities and towns). The research methodology is grounded on the principle of historicism and employs both general and specialized scientific methods, with an emphasis on comparative historical analysis. A key source for this study is the women's press of the 1920s–1930s. Although such sources are often subjective, emotional,*

and sometimes imprecise, being subject to a certain arbitrariness of interpretation, they provide a valuable repository of factual information, which has been analyzed in the study. **The scientific novelty of the study** consists in the use of the periodicals such as “Women's Fate”, “Nova Khata”, “Nyva”, as well as memoir literature to analyze—for the first time in the Ukrainian historical science—the women's movement in interwar Galicia in the context of everyday life and efforts to overcome the civilizational divide between city and countryside. The study also explores the cooperation between female movement leaders and peasant women. The findings contribute to future research in the areas of everyday rural life in Galicia, urban studies, and the history of the women's movement. **Conclusions.** The analysis of interwar Galician women's magazines reveals the specific character of the women's movement during this period and illustrates how its leaders engaged with the worldview of peasant women. They created communication channels that helped to narrow the gap between urban and rural life. When these two worlds intersected, women gained both positive and negative experiences. Nevertheless, these encounters gradually diminished the civilizational divide, elevated educational, cultural, and social standards in rural Galicia, and contributed to women's emancipation while resisting the assimilation policies of the Polish authorities. Internal and external misogyny, passivity, and the lack of unity among women sometimes hindered cooperation. At the same time, everyday practices of mutual support between urban intellectuals and rural women were common. These practices of a mutual support included sharing knowledge about the body and self-care, home and child-care, as well as providing access to education, vocational training, and opportunities for creative expression through participation in women's societies, courses, and circles.

**Key words:** Galicia, women's movement, city, village, women, civilizational distance, everyday life.

## ЖІНОЧИЙ РУХ НА ГАЛИЧИНІ 1920 – 1930-х рр.: ЯК УКРАЇНКИ ДОЛАЛИ ЦИВІЛІЗАЦІЙНУ ДИСТАНЦІЮ МІЖ МІСТОМ І СЕЛОМ

**Мета дослідження** – показати особливості жіночого руху Галичини, його боротьбу за розширення прав і поліпшення культурного, соціального-економічного становища, побутових умов, загалом вирівнювання цивілізаційної дистанції у повсякденному житті українок міста і села. Відтак у розвідці акцентуємо на тих комунікаційних каналах (зокрема, участь у товариствах, навчання на фахових курсах, літні “вакаційні” мандрівки, робота у місті тощо), які допомагали об'єднати жіноче міське та сільське суспільства. **Методологія дослідження** базується на застосуванні методологічного принципу історизму, а також на загальнонаукових і спеціальних наукових методах, передусім на порівняльно-історичному. Жіноча преса 20 – 30-х рр. ХХ ст. як вид джерела попри свої особливості (виражений суб'єктивізм, емоційність, окремі неточності, певну довільність трактування) містить значний ресурс фактологічних даних, які й були нами проаналізовані. **Наукова новизна** дослідження полягає у тому, що, залучивши періодичні видання, зокрема “Жіночу Долю”, “Нову Хату”, “Ниву”, а також мемуарну літературу вперше в українській історичній науці проаналізовано жіночий рух міжвоєнної Галичини у контексті повсякдення і долання цивілізаційної дистанції між містом і селом, а також співпраці лідерок жіночого руху із жінками-селянками. Результати дослідження можуть бути підґрунтям для наступних студій у сфері повсякдення сільського суспільства Галичини, урбаністики, жіночого руху загалом. **Висновки.** Аналіз міжвоєнних жіночих часописів Галичини проливає світло на особливість тогочасного жіночого руху та допомагає зрозуміти, як його лідерки знаходили підхід до світогляду жінок-селянок; прокладали комунікаційні канали, які б «вирівнювали» повсякденне життя українців з міста і села. Коли міський та сільський соціуми пересікалися, то жінки отримували як позитивний, так і негативний досвід. Важливо, що вони поступово стирали цивілізаційну різницю між містом і селом, допомагали підвищити освітній, культурний, соціально-побутовий рівень життя галицького сільського суспільства, поліпшити його повсякдення, сприяли емансипації жіноцтва на Галичині та врешті стримували асиміляційні процеси польської влади. Перешкоджали співпраці як внутрішня, так і зовнішня мізогінія, пасивність, неконсолідованість жіноцтва. Водночас поширеними між представницями жіночого руху/міськими інтелігентками та сільськими жінками були щоденні практики взаємопідтримки й допомоги – у побуті, у набутті та розширенні знань про своє тіло, догляд за ним, оселею, дітьми; у здобутті освіти та фаху; у можливості реалізувати творчий потенціал, долучаючись до жіночих товариств, курсів, гуртків тощо.

**Ключові слова:** Галичина, жіночий рух, місто, село, жінки, цивілізаційна дистанція, повсякдення.

**Problem Statement.** The Ukrainians of Galicia were under temporary Polish occupation from 1919, and from 1923 they became citizens of the so-called Second Polish Republic. The period of occupation was accompanied by double challenges: firstly, the antagonism between us and the Poles; secondly, a deep civilizational gap that affected everyday life of the Ukrainians in the city and the countryside. In contemporary Galicia the leaders of the women's movement (Milena Rudnytska, Olena Kysilevska, Ivanna Blazhkevych, Olena Sheparovych, Sofiya Parfanovych) tried to save its Ukrainian world, strengthen and unite it. After all, this world consisted of two spaces: urban (where the Poles dominated) and rural (where the Ukrainians were predominant). According to statistics, in the 1920s and 1930s, the population of Galicia increased (if in 1921 there were 5,495,114 people living there, then in 1931 there were 6,208,100 people, of whom the Ukrainians made up 52.5% and 54%, respectively) (Pasitska, 2019, p. 71). However, 90% of the Ukrainians lived in rural areas (Pasitska, 2019, p. 72), and therefore the Galician cities and towns of that time had the Polish-Jewish face. For example, according to the 1921 census, Lviv was home to 50.99% Roman Catholics, 35.03% Jews, and only 12.43% Greek Catholics (Makarchuk, 1996, p. 218).

The village preserved Ukrainian traditions, but lagged behind economically, socially, and culturally. The city, on the other hand, was assimilated by the Poles, usurped by the Jews in the trade sphere, but had greater opportunities for cultural and social activities, and better living conditions. How not to get lost among the Poles in the cities and towns, how to find mechanisms that would "equalize" the daily lives of the Ukrainians from the city, town and the countryside, how to raise cultural, educational, and economic life standards of Galician peasants, how to make these two worlds interact and help each other overcome the civilizational distance? During the interwar period, the leaders of the women's movement, in cooperation with ordinary rural women, were engaged in solving these problems on a daily basis.

**Review of Sources and Recent Research.** At first glance, many studies have been done about the women's movement of the interwar period, its ideology, its intertwining with feminism and nationalism, and the participation of Galician women in public and political organizations. Among the scholars who have studied various aspects of the women's movement, as well as dedicated their studies to individual representatives of it, we should mention many of them, in particular Marta Bohachevska-Khomiak (Bohachevska-Khomiak, 1995), Oksana Malanchuk-Rybak (Malanchuk-Rybak, 2006), Myroslava Diadiuk (Diadiuk, 1998, 2011), Borys Savchuk (Savchuk, 1998), Yuriy Yurkiv (Yurkiv, 2008), Vasyl Ilnytskyi, Mykola Haliv (Ilnytskyi, & Haliv, 2019). The diaspora study about Olena Kysilevska, an editor-in-chief of the magazine "Women's Fate", deserves special focus (Rusova, 1945). A researcher Volodymyr Kochkodan studied the activities of women's societies in Galicia analysing the contemporary press (Kochkodan, 2019). However, the analysis of the women's movement in interwar Galicia in the context of everyday life and overcoming the civilizational divide between the city, town and the countryside, the cooperation of women's movement leaders with peasant women have not been the subject of a separate research focus yet.

**The purpose of the research** is to show, based on an analysis of the interwar women's press (in particular, the magazines "Women's Fate", "Nova Khata"), the features of the women's movement in Galicia, its activation, the struggle for the expansion of rights and improvement of the cultural, socio-economic situation, living conditions, and in general the levelling of the civilizational divide in everyday life of the Ukrainian women in the city, town and village. Therefore, in our research, we focus on those communication channels (in particular, participation in societies, training in professional courses, summer "vacation" trips,

work in the city, etc.) that helped unite women's urban and rural societies, find approaches to each other's everyday psychology, and ultimately reduce the civilizational distance that existed between both spaces during the interwar period.

The establishment of those channels depended on urban intellectuals, leaders of the women's movement largely, who were the main contributors to the press we analyzed. In fact, the magazine "Nova Khata" (1925 – 1939) (Lviv) initially aimed at discouraging the Ukrainian women from reading the Polish magazines. Later, the magazine promoted emancipation and gender equality. Gradually, the magazine created a new type of woman who is ready to work for her people, raise a new generation; take into account scientific research, be thoughtful about her health, go in for sports, relax on vacation (summer vacation. – *Authors*), skillfully manage finances (Yavna, 2021).

The establishment of such a powerful women's organization as the "Union of Ukrainian Women" with a network of expanded branches required information dissemination. After all, in the 1930s, there were about 60 thousand members of the society and it was one of the largest women's organizations in Europe. From September 1, 1925, the magazine "Women's Fate" (Kolomyia) became the central printed organ of this organization. Among other things, the magazine covered the problems of the women's movement, changed negative stereotypes about the indifference and inactivity of rural women, influenced the formation of their civic consciousness, the image of a woman responsible for the fate of her own people and the spiritual and patriotic education of a younger generation of the Ukrainian nation. As noted in its second issue, the magazine was published "for peasant women, for the awareness and unification of rural women" («Z zhinochoho rukhu», 1925, p. 14).

**Research Results.** The civilizational distance that existed between rural and urban women in Galicia and affected their everyday lives was gradually overcome through various communication channels (activities). First of all, through education. However, due to the fact that in the interwar years, the path to higher education was generally blocked for the Ukrainian youth, various professional courses were particularly popular, including for rural women (courses in tailoring, sewing, cooking, general housekeeping, and hygiene). The courses were organized by Olena Sheparovych and Lidia Burachynska, the women leaders and active members of the "Union of Ukrainian Women". Ultimately, the main activists in the courses for peasant women were teachers-instructors from the city, who had to undergo appropriate training before going to the village. For example, from January 15, 1927, 19 girls attended 5-month courses for future teachers of tailoring and sewing courses (Sheparovych, 1927, p. 4). From October 25, 1931 to January 24, 1932, a universal educational cooperative and economic course was organized in Nyzhnyi Bereziv in Kolomyia territory (Osvitnyi kurs, 1932, p. 2). In 1937, 18 candidates completed a 4-month instructor course organized by the "Union of Ukrainian Women", 24 completed a six-month course organized by the "Village Farmer" (Radisni novyny, 1937, p. 7). On October 3–5, 1937, two congresses of agricultural instructors and cooperative propagandists were held in Lviv under the auspices of the latter, at which the latter reported on the consequences of their one and a half year stay in the villages of Galicia. In rural areas girls organized competitions in cleaning the houses, reading newspapers aloud, and created amateur circles at the "Prosvita" society, etc. It is encouraging that such professional training gave urban girls the opportunity to look at rural life, the psychology and worldview of peasant women, their everyday life in a different way, because those girls, as L. Burachynska wrote, "*they abandoned the pedestal of the intellectual, which created a gap between the city lady and the village listener*" (Burachynska,

1937, p. 1). Conducting lectures, for example, on cooking (lecture courses), city instructors were aware of “*knowing the needs of the village, to love the village, take into account the specifics of villages; [because] there are forest villages rich in mushrooms, berries; there are villages where sheep are bred, bryndza is produced, there are summer houses (where the city intelligentsia liked to relax. – Authors)*” (I, D., 1939, p. 6), which finally brought them closer to the rural world.

Finding the key to understanding the worldview of a rural woman in a more intimate sphere, which concerned the hygiene of a female body, a woman’s and her child’s health, and hygiene of a house in general, was much more difficult. But the then women’s activist, Dr. Sofia Parfanovych, managed to do this owing to significant educational work. In particular, in numerous articles she called on rural women to realize that “*You need to know the structure of your body,*” stated that among peasant women “*there is great darkness and confusion,*” “*there is a stereotype that only some debauched woman should go to the doctor for women’s matters*” (Parfanovych, 1929, p. 18). “The Ukrainian Hygiene Society”, established in 1929, was actively involved in educating peasant women in the field of hygiene. Members of this organization, in cooperation with the Union of Ukrainian Women, taught villagers to build houses with large windows, wooden floors, and a separate kitchen; they established medical clinics, the so-called *medical advice centres*, and organized sanitary and nursing courses for conscientious peasant women (Osinchuk, 1933, pp. 4–5). Women activists, including O. Kysilevska, drew attention to a high mortality rate of children in the villages of Galicia, which they considered to be a consequence of negligent care, poor nutrition, poverty, and outdated traditions: “*A girl in the village is not interested in anything except household chores and parties. She does as her mother and grandmother taught her. The main thing for her is to get married. And children are a big burden to her, because she doesn’t know how to feed them, how to care for them. Going to the field, she leaves the little child with an older one, threatening: ‘Make sure the child doesn’t cry, because I’ll skin you when I come back’*” (O, K., 1937b, p. 2). According to statistics, the highest infant mortality was observed among Greek Catholics (21.2%) and Orthodox Christians (18.6%), among the Poles – 17%, and among the Jews – 6.2% (A, D., 1935, p. 7).

An important event in the women’s movement in Galicia during the interwar period was the Ukrainian Women’s Congress in Stanislaviv in 1934. The Congress became a real platform for the unification of urban and rural women. The first two days of the program, in particular, on June 23–24, 1934, were dedicated to rural women – “Our Past and Our Competitions”, “Holiday of the Ukrainian Peasant Woman” (O, K., 1934, p. 3). About 5,000 peasant women from various circles of the Union of Ukrainian Women took part in “Peasant Woman’s Day”. The program of this holiday included a bishop’s Divine Liturgy, a viche, musical performances, and a solemn “parade” of peasant women through the central streets of the city, an academy for peasant women, a sports festival, and a tea party “Let’s Honour our Burden”, where all participants demonstrated folk costumes. According to the memoirs of Oksana Lemekha, the organizer of rural clubs in Stanislaviv region: “*The streets of the city of Stanislaviv and the square behind the park were filled to the brim with blooming columns of rural women and young girls, festively dressed in picturesque folk costumes, who delighted the spectators, and for us, the organizers, joy burst into our chests... The mass performance of round dances – ‘hahilok’ – by village girls on a green meadow in an open air on a dazzlingly sunny day, with a rainbow of embroidery – created a native panorama, full of some ancient mystical ritual... and national pride. Such moments in life*

are not forgotten” (Lemekha-Lutska, 1985, p. 350). Even after the Congress, such “peasant women’s festivals” were periodically organized by the women of “The Union of Ukrainian Women” in the villages and towns of Galicia. In particular, on June 27, 1937, the festival was held in Zhovkva. At it, peasant women demonstrated folk dances, clothes, and recreated a traditional wedding (Uchasnytsia, 1937, p. 20).

The greatest opportunities for interaction between urban and rural culture appeared in summer, when gentlemen from the city and town, their wives and children came to the village for vacation. It was very difficult for a city lady to adapt to the uncomfortable conditions of a rural life. But it was no easier for a peasant woman, who received a distinguished guest from the city and had to provide her with comfort, peace, order, hygiene, and cleanliness (Hotska, 1933, p. 4). Magazine materials “suggest” that the establishment of normal relations between these two female worlds was very slow, because for some reason there were too many calls for young ladies “to open their hearts to the peasants”. Moreover, newspaper materials “hint” that representatives of urban society were characterized by “*selfish stubbornness, fixated on their own, only petty matters*” (O, K., 1937a, p. 3), “*a town pseudo-culture (with various quirks, frills), alien to the village*” (Barychko, 1931, p. 9). Women activists sincerely called on the urban intelligentsia to help the village during the summer holidays, in particular, to read, talk about the benefits of kindergartens, organize a choir, a theater, a women’s club “Union of Ukrainian Women”, an outpatient clinic, the so-called “living newspaper” – stories of intellectuals about the importance of fighting alcoholism, eradicating illiteracy, instructions on cultural leisure for youth, proper management of the economy, involvement in cooperative activities, joint reading, etc. (Blazhkevycheva, 1929, p. 10). The leaders of the women’s movement understood well that “an open heart” of intellectuals and their active educational work would gradually transform the gray conservative everyday life of peasant women and bring positive, “revolutionary” changes for that time. In fact, one of the contributors to the magazine “Women’s Fate” mentioned them as early as 1925. Near Deliatyn (nowadays the village of Deliatyn, Nadvirna district, Ivano-Frankivsk region. – *Authors*). She met three women from the village of Stroniatyna (nowadays the village of Stroniatyn, Lviv district, Lviv region. – *Authors*) near Lviv on vacation, who told her about the positive social and everyday changes that had occurred to them personally and in the village as a whole owing to the active work of women from the “Union of Ukrainian Women” circle and economic courses, cutting and sewing courses they organized: “*Every house has a kitchen with a baking sheet for jam, and the stove is only used for bread. Everything is clean. And men don’t fight or quarrel, because there is no inn and fuel*” (O, H., 1925, p. 7).

In the 1930s, the women’s movement feminized, and emancipatory ideas were in the air of Galicia, promoting the economic independence of women and their equality with men, which was related in particular to the latter’s right to a place of work (Fedorovych-Malytska, 1926, p. 4). Such a requirement, given the global economic crisis that also reached Galicia, was a necessity, so women had to acquire a certain profession and “*to earn like men*” (Chyzhovych, 1932, p. 4). More and more young girls in cities realized that “*their dowry should be education, their own bread in their hands*” (W, K., 1934, p. 10), accordingly, we need to leave in the past “*...those times when our great-grandmothers folded their hands in amazement and looked piously at a husband who read, because they themselves could not read*” (E, K., 1936, p. 12). Getting an education and a certain profession gave a girl/woman the opportunity to make a reality what was once an unfulfilled dream for grandmothers and mothers – to manage their own budget and life.

In the 1930s women's organizations, their branches and circles actively raised the issue of women's equality, women's right to work, and protested against the mass dismissal of married women with children. After all, public opinion spread the discourse that such women should vacate their jobs to other unemployed people, and "*raise children themselves and support their husbands*" (Savytska, 1936, p. 8). Some married women even resorted to tricks: in order to avoid being fired from their jobs, they did not enter into an official marriage, living "on faith" (Mirna, 1936, p. 4). In the late 1930s, the ideas of women's economic independence were directly related not only to the opportunity to earn money, but also to increasing their social activity and national consciousness: "*Work outside the house gives a woman the opportunity to meet another world, broadens horizons, opens up new interests, and helps enhance spiritual qualities of a woman,*" who becomes "*a citizen-mother and a worthy person,*" rather than "*a destroyed housewife, irritated by petty matters, and narrow-minded in her views of God's world*" (Mirna, 1937, p. 1).

The idea of creating a network of kindergartens ("zakhoronok") in Galicia is correlated with emancipation processes. It really contributed to emancipation, because, as the initiator of those institutions establishment, a feminist Natalia Kobrynska, wrote, that kindergartens ("zakhoronok") were supposed "*to enable a woman to work outside home*", and her child "*during work*" was supposed to be under care («Dytynstvo pid opikoiu monakhyn. Yak vynykly pershi ukrainski dytsadky», 2021). In cities and towns, the issue of establishing kindergartens was dealt with the Ukrainian Zakhoronok Society, established in Lviv in 1902 (Fedak-Sheparovych, 1927, p. 4). In the villages, this work was undertaken mostly by the circles of the "Union of Ukrainian Women" in cooperation with the "Native School", local priests, their wives, and women-mothers from church brotherhoods (Khaburskyi, 1933, p. 184). The village "zakhoronok" was a seasonal phenomenon, which enabled a peasant mother to leave her child in the hands of specialists during field work and not worry about her life, health, education, or upbringing. One of the propagandists of the idea of establishing kindergartens in the villages of Galicia, I. Blazhkevych, wrote the following: "*Kindergartens are essential in villages where relatives busy in the fields leave children unattended, which often causes misfortune and injury*" («Ditochi sadky», p. 4); "*Village children are running around during harvest time without supervision, and have injuries. We need to convince parents that kindergarten is not a lordly invention, but an essential need of the village*" (Blazhkevych, 1937, p. 8).

The functioning of the village "zakhoronok" provided the greatest opportunity for daily communication and building bridges of (mis)understanding between peasant women and urban intellectuals. After all, kindergarten was organized, headed, and taught by *guides* or *sadivnychky* (kindergarten teachers) – young girls from cities and towns, who at the same time had to communicate with rural women (Kysilevska, 1938, p. 5). It was the figure of a *guide* or a *kindergarten teacher*, her character, and her love of the village that determined whether village mothers would accept the idea of a "zakhoronok". Despite the various obstacles that were numerous. For example, when in 1934 a survey was conducted of kindergarten leaders regarding their impressions of the first year of work in the villages of Galicia, they complained primarily about the rejection of their activities by local authorities, the Polish teachers, Muscovite priests, and the local population in general. Therefore, for example, in one village, "*the kindergarten was deliberately closed, supposedly because of the measles epidemic, which did not spread there,*" and in another, a house was not prepared in time for a kindergarten teacher to live in, who was forced "*to sit near the reading-room*

door on a suitcase for several hours” (Sadivnytska, 1937, p. 12). In 1936, a meeting of kindergarten teachers was held in Lviv, where other painful problems were discussed – insufficient preparation of premises for kindergarten, lack of funds from the peasants for its maintenance and payment. The latter was mainly paid 70 zloty and 50% of children’s performances at festinas (national patriotic holidays and entertainment, a way of spending leisure time of the rural population of Galicia in the interwar period. – *Authors*), religious holidays. The kindergarten teachers noted that “*relatives really pay little. Because peasants have a stereotype that ladies from the city are rich*” (E, K., 1937, p. 8). One kindergarten teacher recalled that she was required to do other work besides looking after the kindergarten – “*in addition to leading the choir with the older children and giving lectures to adults*”; in another village, “*the local soltys demanded that a kindergarten teacher participate in the Polish festival*” (Malytska, 1936, p. 2).

In addition, the national patriotic upbringing of children and the pro-Ukrainian activities of kindergarten teachers often led to their persecution by local authorities. For example, in 1930 in the village of Drahanivtsi, Ternopil district (nowadays the village of Drahanivka, Ternopil district, Ternopil region. – *Authors*) “*The kindergarten leader Nusia Zharska, at the instigation of a teacher Zazula, was beaten by masked strzeszłq (members of paramilitary Polish organizations. – Authors) in the evening when she was returning from the reading room – “so that she would not build Ukraine”. But she continued to work there – leaning on sticks, she returned to the kindergarten with bruises. They threatened to drown her. She organized a performance on the Whitsun (Zeleni Sviata), but the local mayor, having drunk at the Polish festivities, did not allow the performance*” (Vazhke bezpravstvo, 1930, p. 4). This situation was not an exception, on the contrary – rather a confirmation of the repressive policy of the Polish authorities, aimed at the liquidation of preschool institutions, Ukrainian schools, and the reduction of the number of teachers the Ukrainians.

But no repression could prevent the success of a noble cause if the relationship between a kindergarten teacher and village women was well: “*When she (a kindergarten teacher – Authors) is a good person, mothers give even greater expenses, because the village knows how to pay with a heart for a heart*” (Blazhkevych, 1937, p. 8). There were cases when at first the peasant women were reluctant to accept the idea of creating a kindergarten, but when their children, taught by a kindergarten teacher, sang with their voices, “*Father Taras, we are Ukrainian children*” (Pasternakova, 1936, p. 15), – “*More than one mother’s heart skipped a beat. Everyone wanted to keep a teacher for a whole year*” (L., 1934, p. 12). Unfortunately, there were also opposite situations when a kindergarten teacher did not care about the children, came only for the sake of summer vacation. In such a village, “*the kindergarten ceased to exist in a month and for the next few years mothers did not want to hear about it. It is a crime if a tsiatsia wearing a make up comes to the village*” (Blazhkevych, 1937, p. 8). In general, the organization of kindergartens in the Ukrainian villages of Galicia during the interwar period gradually smoothed out the difference between the psychology and life of an uneducated peasant woman and a young intellectual from the city, made a difficult everyday life of a woman in the countryside easier, and improved cultural and educational development level of a rural society.

If summer vacations and organization of kindergartens gave urban intellectuals the opportunity to get to know rural life, then service in the city and town, on the contrary, “*opened the eyes*” of peasant girls to urban society (although such an experience of knowledge was mostly temporary and not always positive). Thus, who is a domestic servant and what

forced her to look for work in the city? Escape from an unloved man, condemnation of the rural community, cruel parents, a difficult economic situation associated with war and crisis. Some came to earn a dowry, return to the village and get married. After all, without money, the chances of getting married at that time were practically zero. For other girls, coming to the city was an opportunity to gain new opportunities, to change their lives for the better.

Families of different levels of wealth hired young unmarried girls from the villages who performed various jobs in the house – maids, cooks, servants, nannies for small children. They became indispensable helpers for city ladies. However, the relationship between the two could develop differently. It is also necessary to understand the national context of the problem, because most village girls, arriving in the city, could very quickly become Polonized. Therefore, it was extremely important to get into a Ukrainian family, not a Polish or Jewish one, where some female employers even considered it their mission to teach their maids to read and write. Women’s magazines were full of advice and instructions on how a lady should “*awaken attachment to her native language, teaching that one should not be ashamed of one’s language, that one should love and respect one’s own, the beauty of the national system...*” (Miiska, 1927, p. 19). Such a mission was generally seen by urban intellectuals, representatives of the women’s movement, who established various organizations for this purpose. For example, the “Society for the Care of Servants and Workers” took care of the maids of Lviv (Shyian, 2024), and the “Buduchnist Society”, established in 1929 on the initiative of Metropolitan Andrei Sheptytsky. The latter’s charter states that its organizers are urban intellectuals, kindergarten teachers who “*save the young for the nation, help, and take care of them as if they were their own*” (Duchyminska, 1937, pp. 15–16).

For peasant women, city customs seemed corrupt and alien compared to a quiet, peaceful village. Therefore, the vast majority of maids viewed their work in the city as temporary: “*they go home to the village for holidays, stick to the boys from the village, and don’t go to city parties. The city is far and alien to them, besides the fact that they live in it*” (Nyzhankivska, 1939, p. 4).

Many of them, trying to somehow socialize and maintain communication with “their own”, become members of church fraternities, attend church. By the way, going to the temple of God was at the same time the period of rest for the overworked maids, even an opportunity to arrange their personal lives. In addition, the church was a legitimate place of leisure, one of the public spaces of the city and town, where maids could feel safe. Here they could participate in public life, sing in the choir. In particular, the activities of the “Society for Care of Servants and Workers” in the town of Stryi, established in 1912, were aimed at this. It organized “steps” for the maids, singing, reading, rukhanka, courses for the illiterate, embroidery courses, folk dances, pilgrimages to Hoshiv (nowadays the village of Hoshiv, Kalush district, Ivano-Frankivsk region. – *Authors*) (Bachynska, & Kostiv, 1929, p. 13). Unfortunately, such activity often caused conflicts between a peasant woman and her mistress, which ended with a dismissal of the former. The reason for this could also be the incorrect address, since it was customary to address mistresses as a “high” or “noble” lady (Shyian, 2024). However, there were also opposite cases, when, for example, the owners of the house became godparents for the child of their maid; when the mistress was a friend for the maid. Such, in particular, were the relations between 25-year-old Anna Hohot from Zolochiv district and her mistress Kateryna-Ceciliya Wielkopolska, who lived at 52 Kokhanovskoho Street (nowadays – K. Levytskyi Street. – *Authors*). The hostess, as an intern in the maternity ward, was present at Anna’s birth and allowed her to work with the baby in her home (Cherchovych, 2023, p. 380).

Life in the city and town often motivated an innocent village girl to strive for an easy life. Naive and deceived, they became victims of scammers, the object of trafficking or other threatening situations. And many such cases were recorded. We read about one of them in “Zhinocha Volia” – a supplement to “Zhinocha Dolia” for 1937: “One day, the father scolded his daughter, and she “fell into a deep sleep” and ran away to the city to work. At the train station, she met a young man who said that his mother needed a maid. He took her to an older woman, supposedly his mother. The woman treated the girl to a meal, and the girl fell asleep soundly. She wakes up early and can't believe her eyes: there's a man lying next to her, and she's screaming like a mother that she robbed her. Before the girl could come to her senses, she ended up at the police station. It was God's providence that the commissioner of that station was on vacation in the same village the girl came from. He recognized the girl and the case ended happily for the girl” (Do mista na sluzhbu!, 1937, p. 7).

**Conclusions.** The analysis of interwar women's magazines in Galicia sheds light on the peculiarities of the women's movement of that time and helps understand how its leaders found an approach to the worldview of peasant women; they laid communication channels that would “equalize” the everyday lives of the Ukrainians from the city, town and the countryside, bring those worlds closer together, and overcome a huge civilizational distance between them.

When urban and rural societies intersected, women had both positive and negative experiences (for example, rural women, upon entering the city and town, felt alienated, lonely, and could be victims of violence, ridicule, scammers, etc.; relations between urban intellectuals and peasant women remained difficult during vacations; the active organizational work of women leaders was partly not accepted by local rural authorities, a patriarchal conservative society, and rural women, etc.), but it is important that such experiences existed. Because they gradually erased the civilizational difference between the city, town and the countryside, helped to raise educational, cultural, social and household standards of life of the Galician rural society, improved its everyday life, contributed to the emancipation of women in Galicia and ultimately restrained assimilation processes of the Polish authorities. Both internal and external misogyny, passivity, and lack of consolidation of women hindered cooperation. At the same time, daily practices of a mutual support and assistance were common among representatives of the women's movement/urban intellectuals and rural women – in everyday life, in acquiring and expanding knowledge about one's body, caring for it, housing, and children; in obtaining education and a profession; in the opportunity to realize one's creative potential through participation in women's societies, courses, circles, etc.

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**TECHNOLOGY OF STATISTICAL ANALYSIS OF ILLEGAL MIGRATION  
ON “THE ZBRUCH BORDER” (1921 – 1939)**

**Abstract.** *The purpose of the research* is to make an attempt regarding the historical and statistical analysis of the phenomenon on illegal migration in “the Zbruch section” (within Tarnopol Voivodeship, the Republic of Poland) of the Polish-Soviet border in 1921 – 1939. **Methodology of the Research.** The author applied historical typological, statistical, comparative and systematic methods in order to highlight the main features of the collective image of an illegal migrant or smuggler on the Polish-Soviet border. **The scientific novelty** of the research is that, based on the modern development of historiography and the involvement of a wide range of the archival sources, the known cases of the illegal migration have been classified according to social, political, national, territorial and inclusive criteria. Due to the specific criteria identification, it was possible to better determine the causes and consequences of the phenomenon of the illegal migration on “the Zbruch section” of the Polish-Soviet border in 1921 – 1939. Owing to the application of several classification criteria, it was feasible to determine that the illegal migrants (refugees) were the representatives of diverse nationalities (the largest percentage were the Ukrainians, the Jews and the Poles), the people of excellent territorial origin and social status, religion and in different age categories on “the Zbruch section” of the Polish-Soviet border in 1921 – 1939. The interdependence of this classification with current political and economic phenomena in the USSR has been visible: during the period of collectivization and the Holodomor of 1932 – 1933, the vast majority of the refugees were peasants; when the protracted struggle against the church began, priests began to appear more often among the refugees. **Conclusions.** Taking into consideration such diversity among illegal migrants, the following could be stated: the massiveness of the studied phenomenon, social diversity among refugees, its importance as an integral part of the reality of the interwar period, and outline further prospects for the study on violations of the Polish-Soviet border regime.

**Key words:** refugees, “Zbruch border”, Republic of Poland, USSR, Holodomor of 1932 – 1933, smuggling, illegal migration.

## ТЕХНОЛОГІЯ СТАТИСТИЧНОГО АНАЛІЗУ НЕЛЕГАЛЬНОЇ МІГРАЦІЇ НА “ЗБРУЧАНСЬКОМУ КОРДОНІ” (1921 – 1939)

**Анотація.** *Метою дослідження є спроба історико-статистичного аналізу явища нелегальної міграції на “збручанській ділянці” (в межах Тарнопольського воєводства, Республіка Польща) польсько-радянського кордону в 1921 – 1939 рр. **Методологія дослідження.** Використовуючи історико-типологічний, статистичний, порівняльний та системний методи, автор намагається висвітлити основні ознаки збірного образу нелегального мігранта чи контрабандиста на польсько-радянському порубіжжі. **Наукова новизна** дослідження полягає у тому, що на основі сучасного розвитку історіографії та залучення широкого кола архівних джерел відомі випадки нелегальної міграції класифіковано за соціальними, політичними, національними, територіальними й інклюзивними критеріями. Виокремлення конкретних критеріїв дозволяє краще визначити причини та наслідки явища нелегальної міграції на “збручанській ділянці” польсько-радянського кордону в 1921 – 1939 рр. Завдяки застосуванню кількох критеріїв класифікації, вдалося з’ясувати, що нелегальними мігрантами (біженцями) на “збручанській ділянці” польсько-радянського кордону в 1921 – 1939 рр. були представники багатьох національностей (найбільшою була частка українців, євреїв і поляків), люди відмінного територіального походження і соціального статусу, віросповідання та у різних вікових категоріях. Видима взаємозалежність цієї класифікації з актуальними політичними й економічними явищами в СРСР: у період колективізації та Голодомору 1932 – 1933 рр. переважну більшість біженців становили селяни; коли розгорнулася боротьба з церквою, серед біженців почали частіше з’являтися священники. **Висновки.** Таке розмаїття серед нелегальних мігрантів може свідчити про масовість досліджуваного явища, соціальну різноманітність серед біженців, його важливість як невід’ємної частини реальності міжвоєнного періоду й окреслити подальші перспективи дослідження порушень режиму польсько-радянського кордону.*

**Ключові слова:** біженці, “Збручанський кордон”, Республіка Польща, СРСР, Голодомор 1932 – 1933 рр., контрабанда, нелегальна міграція.

**Problem Statement.** Modern Ukrainian and foreign historiography studies the illegal migration across the Polish-Soviet border mainly in the context of the border studies, “active intelligence” by the Soviet special services in the early 1920s, or the issue on the Holodomor of 1932 – 1933. The above-mentioned approach leaves behind other facts of the border regime, which leads to an artificial narrowing of the statistical sample and the list of reasons, which provoked the phenomenon of “flights from the USSR” on the Zbruch section of the Polish-Soviet border during the interwar period.

The author made an attempt to classify the statistical samples of the people, who crossed the Polish-Soviet border illegally or tried to do so according to various criteria, essential characteristics and circumstances that influenced migration in this article.

The purpose of the research is to study social, statistical and national cross-section of the groups of people, who became illegal migrants (refugees) in order to form an idea of the spread of the illegal migration from the Ukrainian Soviet Socialist Republic (Ukrainian SSR) to the territory of Poland in the 1920s and 1930s. The definition of a social sample: a set of elements of the sociological, or historical, in this case, the object of research, which is subject to direct review, is considered to be an essential issue in the study on the illegal migration processes on the Polish-Soviet border in the 1920s and 1930s. The integrity of the methods and means of isolating the elements of the object, the subject of observation and research, the classification of individual units, groups that illegally crossed the state border are all considered to be vital issues. Hence, there is a drastic need to generalize, which stems from the characteristic and unique migration precedents that enable fully the social basis of the illegal migration flows between the Union of Soviet Socialist Republics (USSR) and the Republic of Poland.

**Review of Sources and Recent Research.** After 2014, due to the actualization of a wide interest in the history of Ukraine both inside and outside the country, the studies on the Polish-Soviet border of 1921 – 1939 began to appear, in particular during the Holodomor of 1932 – 1933, and the illegal trade, migration of people, military and sabotage and intelligence activities. The scholars tried to give a response to the acute issues of the modern (hybrid, and then full-scale) war with Russia, to search for examples of the national consolidation in history, interaction across the front line, which is turning into a closed border, hence, there were numerous studies (Chmelyk, & Khakhula, 2022, p. 222). The study on the illegal migration activities on the border was not left aside by the world historians, who were interested in the phenomenon of the USSR closed state border, its role in the formation and establishment of the totalitarian system, and the mechanisms of protecting the state border. Taking into consideration, a rather short period that has passed since the beginning of the surge of interest in the rudimentary “ryzky” (or, in a narrower context, “zbruchansky”) border, the amount of historiography devoted directly to illegal activities on it is quite limited. In this context, it is worth mentioning the historical studies carried by Timothy Snyder, Peter Adelsgruber, Sabina Dullin, Kate Brown, Yaroslav Papuga, Serhii Humennyi (Humennyi, 2021, p. 26; Zuliak, & Kulyk, 2023, p. 132).

It should be mentioned that the studies on the the border guards activities of the interwar Poland – the Border Guard Corps (in Polish “Korpus Ochrony Pogranicza” – KOP) and the police units were crucial. In this part of the historiography, it is worth mentioning the research achievements of such scholars as Henryk Dominiczak, Artur Ochal, Andrzej Peplowski, Mariusz Jabłonowski (Humennyi, 2019, p. 328; Humennyi, 2023, p. 21). The modern scientific study on the illegal crossing of the state border issue between the USSR and the Republic of Poland would be insufficient if the archival sources were not involved in the study. The activities of the state police and the Border Guard Corps (KOP) in the counties of Tarnopil Voivodeship were covered and could be found in the funds of the State Archive of Ternopil Region (DATO). In contrast, the State Archive of Khmelnytskyi Region (DAKhmO), the State Archive of Vinnytsia Region (DAViO), and the State Archive of Volyn Region (DAVO) provided information about the measures taken by the Soviet and Polish (Archive of the Border Guard Service of Poland – ASG) sides to protect the state border on the Zbruch and regulate life on the border.

It is preferable to reveal the essence of definitions, which are related to the consideration of the illegal migrations phenomenon through “the Zbruch border” from 1921 to 1939, while analyzing the topic of the article. There is a discrepancy in the exact nicknames of the illegal migrants in diverse sources of that time. This name usually depended on which side a person, who identified himself as an illegal migrant belonged to. “A person, who crossed the border illegally ” – this is how the refugees are called in the official documents of the police checkpoints and the KOP battalion (State Archive of the Ternopil Oblast, f. 316, d. 1, c. 349, p. 13). The Soviet side did not use any specific concept that would characterize the phenomenon of escape from “a country where a person can breathe freely,” and the illegal migrants were considered to be the “spies,” “counter-revolutionaries,” “smugglers,” and “bandits” (Diullen, 2014, pp. 73, 79). The attitude of the Soviet authorities towards those, who fled abroad was covered in the official document “On Supplementing the Regulations on State Crimes (Counter-Revolutionary and Especially Dangerous Crimes Against State Order for the USSR)” with the articles “On Treason to the Fatherland” issued on June 8, 1934, which stated that: “the escape is punishable by the highest degree of criminal punishment –

by shooting with confiscation of all property, and in the presence of mitigating circumstances – by imprisonment for a term of up to 10 years with confiscation of all property” (Sobranye zakonov, 1948, p. 255). The most diverse in terms of the characteristics of the refugees from the Ukrainian SSR was the Western Ukrainian press, on whose pages they were called “the refugees from the other side of the Zbruch River”, “the refugees from the USSR”, “the fugitives from famine”, “the fugitives” (Humennyi, 2021).

In this article, the terms “refugees” and “illegal migrants” will be used, as those that, to our mind, characterize the essence of this phenomenon in the interwar years most comprehensively. According to modern science the term “refugees” are people who, for some reasons, became victims of persecution for their faith, nationality, language, membership in a certain social group, political beliefs and are outside the country of their citizenship or origin and cannot or do not want to use the protection provided by this country. In turn, illegal migrants are people who, having left their country of permanent residence, entered the territory of another country without any official permission to do so and refused to leave it, return to their country of origin, motivating their actions with political or other persecution, a threat to their physiological existence (Eldridge, 2022).

**Purpose of the Research.** The purpose of the research is to make an attempt regarding the historical and statistical analysis of the phenomenon on illegal migration in “the Zbruch section” (within Tarnopol Voivodeship, Republic of Poland) of the Polish-Soviet border in 1921 – 1939.

**Research Methods.** The methodology of the research is determined by an interdisciplinary approach (history, statistics, economics) and is based on general scientific and special historical methods. There have been applied the historical typological, statistical, comparative and systemic methods, the author has highlighted the characteristic features of the collective image of an illegal migrant or smuggler on the Polish-Soviet border.

There has been applied a complex of general scientific methods (analysis and synthesis, description of the nature of events and their explanation) while conducting the research. There has also been also used the historical genetic method due to which it was possible to analyze cause-and-effect patterns important for the technologies of statistical analysis of illegal migration on “the Zbruch border” (1921 – 1939) in the article.

**Research Results.** There should be outlined social categories of illegal refugees, migrants, saboteurs and smugglers on the basis of a complex of causal relationships, which triggered the illegal border crossing. It is necessary to take into account political, economic, social and status characteristics of the border areas residents, people of other territorial origin, who crossed the border illegally in the 1920s and 1930s. We are going to consider all the features of the multifaceted migration process and, note that no classification should be considered indisputable before conducting a comprehensive study of a social selection of illegal migrants on the Polish-Soviet border. The categories below can be revised in light of new documentary sources or after developing new methodological approaches to sampling for the issue under study. In addition, when analyzing different groups of the illegal migrants, it is vital to take into account the limited nature of the sample, since the data of the state bodies used by the scholar mostly contradict the subject of the study, since most of the documents involved relate to unsuccessful attempts to cross the border or the detention of offenders. Instead, there are successful examples of crossing, which are presented by the subjective sources (the memories of the migrants, publications in the media, correspondence).

We will begin our consideration of the socio-historical portrait of refugees and smugglers by classifying illegal migrants based on their social status. Data on the type of activity of the

detained refugees could be found mainly in the interrogation protocols of people arrested by the Polish or the Soviet side during illegal border crossing, in particular, it was studied the following:

– The majority of the illegal migrants or smugglers were rural residents (the Ukrainians, the Jews, the Poles), in the documents of the Polish state police departments, and later – the KOP, the economically active part of the peasantry (“kulaks” – according to the Soviet classification), hired agricultural workers were noted. For example, in the case of Hukiv customs (nowadays the village of Kamianets-Podilskyi district of Khmelnytskyi region), the Soviet border guard in a document dated October 1, 1923 noted that 90% of smugglers were local residents, who took on such risky work because of poverty. “The peasant population here (near the border on the Zbruch River – *the author*) is mostly poor, without the most basic equipment, and illiterate. These everyday difficulties on the border became a favourable ground for smuggling to be considered as a common phenomenon, a way of voluntary earnings, and not as a crime that undermines the economic development of the country,” complained the head of Hukiv customs, Karpenko (State Archive of the Khmelnytsky Oblast, f. P-323, d. 3, c. 4, p. 8).

– *The migrant workers* were another significant part of the social sample of illegal migrants. It was mentioned that, a senior police officer Kazimierz Platskevycz detained a person on September 19, 1930, who could not present permits for staying in the border zone in the report of the police department at Chortkiv railway station. The investigation revealed that the unknown person was Kostiantyn Ivaskiv, originally from Ivano-Frankivsk region nowadays. After crossing the border in 1919, “when there was no border yet,” he worked as a carpenter in the border village of Zhabyntsi (nowadays Kamianets-Podilskyi district of Khmelnytskyi region). Ivaskiv made numerous “shuttle migrations” across the poorly controlled border (in the 1920s, the Soviet border guards did not guard the border very carefully, as they were engaged in smuggling and constantly let saboteurs through), each time returning to the USSR. However, active collectivization deprived him of the opportunity to earn a living, his property and carpentry workshop were confiscated, and the craftsman himself was forced to work on a collective farm for food. Konstantyn Ivaskiv decided to cross the border illegally again as he was unable to bear the poverty and was caught by the Polish border guards (DATO, f. 283, d. 1, c. 109, pp. 2–11).

– The *pre-revolutionary intelligentsia and individuals*, who collaborated with the Ukrainian or Polish authorities in 1917 – 1921. More than 10,000 Ukrainian soldiers, who later ended up in internment camps in Kalisz, Wadowice, and Strzałków, moved to the Polish bank of the Zbruch at the end of 1920 (Olszewski, 2012, p. 10). Illegal migration across the Polish-Soviet border remained almost the only way to Europe, a chance for the professional growth and free creative and national activity. Hence, diverse representatives of the intelligentsia resorted to illegal migration at different times. For example, the Ukrainian writer and nationalist movement activist Olena Teliha (Shovheniv) left the Ukrainian SSR near Kamianets-Podilskyi (1922) with her mother and brother illegally (Zhdanovych, 1947, p. 144). A renowned dancer, Serge Lyfar managed to emigrate illegally on his second attempt: “My family did everything possible to organize my escape. They bought gold and various currencies, experiencing great difficulties. My family let me go easily (...) they supported my intention to escape abroad, as far as possible from the poor Soviet life” (Lyfar, 1994, p. 119).

– Sometimes even *the clergymen* became illegal migrants or, according to the official documents, smugglers. The Soviet newspaper “Chervonyi Kordon” in its issue dated October

12, 1927, reported that in 1923, a Catholic priest “from the city of Smotrych (nowadays Khmelnytskyi region – *the author*) Vaclav Shymansky “helped” two of his parishioners, Skardeli and Motyka (...), to cross the Soviet border into Poland. Motyka was detained by the State Border Service of the Ukrainian SSR. According to the Soviet investigators, another priest, Marian Yendrushchak, “instructed his parishioners Sapko, Baranivska, and Pidvysotska to buy the counterfeit goods for him for 150 and 250 karbovantsiv. Then he sold the goods”. Both priests were imprisoned for a term of six months to one year, followed by five years of exile outside the Ukrainian SSR as “socially harmful elements”. However, the Bolsheviks’ anti-religious policies (including the flight of priests to Poland and the Bolsheviks’ closure of churches) met with resistance from the broad masses of the Ukrainian rural population (Belyaev, 1927; Kuśnierz, 2023, p. 72).

– *Former or active military personnel* with experience of serving in the ranks of the army of the Ukrainian People’s Republic (UNR), the Ukrainian Galician Army (UGA), participants in the insurgent movement against the Bolshevik regime, deserters from the Red Army (Workers’ and Peasants’ Red Army) and the Polish Army also made up a significant share of the illegal migrants. According to Prof. Oleksandr Zdanovych, “there were 159 Soviet military personnel, who fled to Poland from 1921 to 1933. The most “fruitful” for the Polish intelligence were 1922, 1930, 1931, 1932 and 1933 (41, 23, 13, 12 and 14 defectors, respectively)” (Zdanovych, 2017, p. 193).

The Soviet border guard Sergei Tykhonovych, reporting that his family was starving, asked for asylum in the Republic of Poland, citing the voluntary nature of his escape from the USSR (State Archives of Volyn Region, f. 46, d. 9-A, c. 427, pp. 17, 29–30). There were also cases of desertion among the Polish border guards, since not all of them could withstand six months of being away from settlements, often with a threat to their lives or in a different ethno-national environment. According to a survey in 1927, there were recorded 118 escapes of the officers and soldiers of the Border Guard along the entire eastern border of the Republic of Poland. The excessive severity of the Border Guards was the paramount reason for the escape of personnel. For example, the case of the desertion of Franciszek Sieradzki, KOR of the “Kudryntsi” company (nowadays Chortkiv district, Ternopil region), who fled to the Ukrainian SSR on May 8, 1930, while on patrol. The reason for the desertion was the fear of reporting and punishment for wearing unregulated buttons and overcoats. The “refugee” himself told about this in Kamianets-Podilskyi during a meeting with another Polish border guard-deserter (Archives of the Polish Border Guard, f. 177, c. 541/109; f. 178, c. 542/47).

It is vital to outline the reasons for “smuggling” on the Polish-Soviet border in order to understand the widespread categories of the illegal migrants:

- monopoly (including tariff and customs restrictions) policy of the states in their foreign trade;
- the post-war economic stagnation, features of “war communism” and the NEP policy (the emergence of the possibility of selling smuggled goods in private shops, located, for the most part, on the Polish side, even on small islands in the middle of the Zbruch River, such as a cloth and alcohol store opposite the Soviet village of Wolokhy), as well as the resulting commodity shortage on the domestic market of the USSR;
- limited imports of consumer goods and the inability of the Soviet state to provide its own population with a wide range of high-quality goods produced on the domestic market;
- the imbalance of supply and demand, which arose against the background of the gradual increase in the purchasing power of the residents on both sides of the border (since the mid-1920s);
- the lack of developed industry and agricultural cooperation in the immediate vicinity of the border, the high cost and low quality of the Soviet goods did not contribute to competition

with relatively cheap supplies of the European and American products through the Republic of Poland;

– historical maintenance of trade and economic contacts in the border zone of Polissia and Volyn, restoration of traditional illegal trade flows near the “the Zbruch section of the border” (DAKhMO, f. P-323, d. 3, c. 4, p. 47).

Let’s consider several examples of recorded facts of the smuggling on the Polish-Soviet border by the Polish or the Soviet side. Some information about the development of the border, the scale and composition of the turnover of the illegal goods coming from Poland to the Ukrainian SSR near Skala nad Zbruchem, Borshchiv district, were provided by Naum Bernstein: “The industry of the Soviet Union at that time (the 1920s – *the author*) was, as is known, almost destroyed, and the industrial goods were supplied to the inhabitants through smuggling. The Polish-made fabric was widely used in Orynyn (nowadays Khmelnytskyi region – *the author*). There were two woolen fabrics under the names “Boston” and “kostor” (...), other industrial goods could also be found there. These goods were paid for only in foreign currency, mainly gold coins issued during the tsarist regime, and dollar banknotes. The closest Polish town to the border was Skala, where the smugglers from Orynyn had acquaintances. The border line was guarded, but not as strictly as later on, when the border was “closed” (available on (I mean the increased border security on the Soviet and the Polish sides in the 1930s – *the author*). The so-called “guides”, the people, who knew where to cross the river and who definitely had some “contacts” with the security (...). But there were numerous tragic cases. My aunt Brana Weinstein died on the border. She was shot right in the river” (Bernshtein, 2009, pp. 39–40).

It should be stated that a more informative classification of illegal migrants by motivation for crossing the border seems to be the author’s methodological approach in order to study the reasons that prompted a specific person to violate the regime of a checkpoint at the state border, in particular:

– Voluntary *illegal migration* is the act of crossing the state border, carried out by a person internally, without coercion, intentionally, committed for certain reasons: political persecution, economic hardship, starvation, threat to personal freedom and life and livelihood of relatives, desire to restore contact or live together with relatives on the other side of the border, unwillingness to serve in the Red Army or the Polish Army, job search or inability to carry out professional activities in the territory of Poland or the USSR, religious beliefs. Examples of voluntary illegal migration include:

• The protocol of the KOP in Pidvolochysk dated October 18, 1932 states that 18-year-old “Yadviga Blazheyovska (the text of the protocol also contains a variant of the surname “Blashkova”)” from Volochysk, crossed the border with her mother Maria Blazheyovska and her brother illegally, fleeing from hunger, because “in 1932 the Bolsheviks took away our entire grain harvest, leaving us without a piece of bread”. Since Yadviga’s mother was from the Galician village of Dorofiivka (nowadays Ternopil region), the family decided to flee to live with a relative, Matviy Kharchuk (DATO, f. 176, d. 1, c. 9, p. 6).

• Stepan Hrenskyi and Stanislav Olenin from the border town of Tarnoruda explained their escape from the USSR on February 23, 1934, by “hunger and political persecution by the USSR authorities” (DATO, f. 231, d. 1, c. 2113, p. 15). A 25-year-old Ilko Stychurskyi from Shuparka, Borshchiv district, crossed the border “in search of work” and was detained by the Polish border guards when he tried to return from the Ukrainian SSR on December 14, 1931 (DATO, f. 316, d. 1, c. 349, p. 32).

• In 1935, Anton Vashkevych, who came from Łańcut povit (county) (nowadays the Republic of Poland), was arrested in Voronovitskyi district of Vinnytsia region and was accused of illegally

crossing the border with the USSR in 1922 and espionage in favour of Poland. During the investigation, it was determined that Vashkevych served in the Polish army for a month and a half in 1922 and deserted during his leave because he fell ill with typhus, switching to the Soviet side (State Archive of the Vinnytsia Oblast, f. 6023, d. 4, c. 783, pp. 9, 18, 29).

– *Forced (mandatory) illegal migration* occurred mainly through the fulfillment of tasks set by the security services of the Republic of Poland or the USSR. There could be highlight edespionage, incitement, information gathering, penetration into law enforcement agencies or national, party organizations, combat operations, provocations among these tasks. Due to the threat of deportation (outside the country or within it), extradition (forced return, for example, of a Red Army deserter), the forced migration could also be caused. The story of the Jewish girl Zinaida Aloiza, whom the American newspaper Svoboda mentioned, describing her as “a young beautiful woman (who – the Author) graduated from espionage courses in Kharkiv” is considered to be significant. The girl had to “cross the Zbruch with the agent Zakharchuk” and fulfill the task “to marry a Polish officer... in order to collect data on the Polish secret agents” (Svoboda, 1930, p. 1). Instead, Pavlo Khomenko (a nickname “Danylevskiy”) was an agent of the Polish intelligence in Kamianets-Podilskyi. The State Police of the Republic of Poland mentioned him in its report for December 1922 as a “non-resident of Galicia” in the military commissariat of Kamianets. According to some sources, in mid-1923, Khomenko, concerned about his safety, emigrated to Poland illegally, where he got a job. He was appointed as the Head of the Intelligence Border Post in the town of Skala nad Zbruchem, Borshchiv povit (county), Tarnopol Voivodeship (Zdanovych, 2017, p. 192).

The refugees on the Polish-Soviet border can be also classified according to such characteristics as the *nationality, faith, inclusive features or religious affiliation*. The documents on the Border Guard Corps (KOP) and the Soviet border guards required the nationality of those detained for illegally crossing the border to be indicated. According to these data, the Ukrainians, the Poles, the Jews and the Russians predominated among illegal migrants. For example, Mykola Kuzmin from Rostov and Pavel Morozov from Leningrad were caught and interrogated on the Polish-Soviet border on September 20, 1929. Numerous illegal migrants were the ethnic Poles, who sought to cross the border to get to their homeland. They retreated with the Polish army in 1920. Hence, there could be found some information in the indictment of Julian Woncholski (1933, Article 54-10 of the Criminal Code of the Ukrainian SSR) from Kholmynsky district of Vinnytsia region about the escape of his son Kazimierz to Poland. There could be found people of the Czech and the Slovak origin, such as Frančišek Kučera, who tried to cross the interstate border “to earn money in the Soviet Russia (USSR)” among those detained by the Polish border guards (DAViO, f. 6023, d. 4, c. 3200, pp. 4, 10–11; DATO, f. 283, d. 1, c. 109, p. 29).

According to information based on the materials from the Polish side, the Zbaraż and Borszów district police teams, the following categories can be distinguished among the illegal migrants by religion: the Jews, the Greek Catholics, the Orthodox, the Roman Catholics, the Protestants, the atheists (DATO, f. 316, c. 626). Similar documents entitled “The List of Refugees from the Soviet Russia (USSR)” or “The List of Fugitives to the USSR”, compiled by the “district” teams of the state police of the Republic of Poland, mainly contained data on the date of birth or age of the illegal migrants (in Polish – *uchodźcow*), which allows us to outline the age (physiological) categories of the refugees. Hence, taking into consideration the age classification, we can conclude that among the “fugitives” there were people of the preschool age (3-6 years), the adolescents (10-15 years, who were often involved as the couriers-smugglers), the youth (15-21), the early adulthood (21-40), the middle-aged (40-60) and even late adulthood (60 and above). Almost the entire spectrum

of the age categories of the illegal migrants was presented in the memo of the KOP of the battalion No. 14 “Borshchiv” issued on June 2, 1931, which reported on the detention of the Borchuk family from Voytovets (nowadays Khmelnytskyi region), who crossed the state border. The oldest detained refugee, Oleksa Borchuk, turned 55 that day, and the youngest, Arkhip Borchuk, was 15. On the territory of Borshchiv district itself, near the village of Hermakivka, on January 18, 1934, the fact of the transfer of the Roman Catholic Jackowski family to the Polish bank of the Zbruch River was discovered. The oldest representative of the family, Jozef Jackowski, was 47 years old, and the youngest, Marian, was only a year old (DATO, f. 281, d. 1, c. 158; f. 231, d. 1, c. 2113, p. 24).

There is an excerpt from a commemorative plaque below, which was compiled by the Polish Border Guard Corps in the village of Lysychyntsi, Zbaraż povit (county), Tarnów Voivodeship (DATO, f. 316, d. 1, c. 626, p. 4) (Table 1). Taking into consideration this table, you can obtain information about the age, religion, and place of origin of the illegal migrants.

Table 1

**Excerpt from a commemorative plaque compiled by the Polish Regional Committee of Lysychyntsi, Zbaraż povit (county), Tarnopol Voivodeship (DATO, f. 316, d. 1, c. 626, p. 4)**

№	Surname and first name	Years	Confession	Permanent place of residence	Date of escape	Return
1	Prychitka Stefan	32	Greek Catholic	Soviet Russia	1918	-
2	Tychyj f. Rychlewski	21	Catholic	Podwoloczyska	23.V.1931	13.VII.1931
3	Reznik Franko	20	Catholic	Staromiej szczyzne	3.V.1931	24.VII.1931
4	Husak Mikołaj	21	Catholic	-,,-	17.V.1931	24.VII.1931
5	Szapował Jan	17	-,,-	-,,-	19.V.1931	26.VII.1931
6	Bajda Włodzimierz	18	-,,-	-,,-	26.V.1931	24.VII.1931
7	Jazczuk Paweł	19	-,,-	-,,-	26.V.1931	24.VII.1931
17	Lisowski Iwan	21	Catholic	Dorofijówka	4.VI.1931	Did not return
18	Walczak /fornal/	-	-	Kamionka	4.VI.1931	Did not return
19	Charczuk Tomasz	-	-	Unknown	4.VI.1931	Did not return
20	Biłas	-	-	Nastasowa	Unknown	Did not return
21	Stelmach+brat	-	-	Unknown	Unknown	Did not return
23	Maksymiszyn Iwan	-	-	Tarnopol	Unknown	Did not return
24	Gadzinowski Jan	-	-	Lwów	Unknown	Did not return
25	Horlaj	-	-	Lwów	Unknown	Did not return

We should pay attention to the frequency of detection of people with disabilities (hearing impairment) within the border zone when classifying the illegal migrants according to the

criterion of inclusiveness. For example, there were detained 4 “deaf-mute people”, one of whom managed to write information about himself in Hebrew, by the soldiers of the Yampil border post, on September 5, 1932, near the village of Baymaki (nowadays Bilohirskiy district of Khmelnytskyi region). Due to poor command of the Russian language, they concluded that “abroad – a fugitive”. The Soviet border guards understood only his age – “50” years from the text of the detainee. The name of the arrested person was established by a bread card written on it “Hrihoriy (Itsko) Konevskiy” and confirmed during interrogation in the Vinnytsia SIZO (DOPri) (DAViO, f. 6023, d. 4, s. 89, pp. 1, 6, 7). 20 вересня 1932 р. The Soviet border post in Slavuta also detained two “deaf-mute” children (names not specified): “One aged 15–16 (higher), detained at the border with Poland, and the other one, aged 10–12, detained for the fifth time during an illegal crossing into Poland without any documents (...) we sent him to the Shepetivka workers’ clinic to see an expert doctor for examination and, according to the conclusion, he was taken out through the Slavuta police district outside the border zone,” and then sent to a “collector for homeless deaf-mute children (literal translation – *the author*)” (DAViO, f. 6023, d. 4, s. 90, pp. 1, 4). The Soviet border guards sent to Vinnytsia “a deaf-mute woman (inaudible – the author) and Vadym Volodymyrovych Yazko, a native of Vinnytsia district, who arrived from Poland to our side illegally” in the summer of 1933. Such a high frequency of detection of people with hearing impairments on the Polish-Soviet border was localized during the Holodomor of 1932–1933, becoming part of one of the historical peaks of the illegal migration on “the Zbruch border” (DAViO, f. 6023, d. 4, s. 108). However, the motivation of people with the disabilities when crossing the border into the USSR remains unclear. Such actions could only be explained by low awareness of the situation in the Soviet state due to the communication barrier characteristic of people with hearing and vision impairments, the Bolshevik propaganda on the border. It is also likely that people with the disabilities could have been scouting for the illegal migration for their relatives, close friends, in the interests of the state structures or the smugglers (or were the smugglers themselves – the “pachkari” (“packers”)), since they did not provide any information in case of detection by the border guards.

The illegal migrants classification by *their territory of origin* is crucial. Based on the processing of archival funds, the following regions could be named that the refugees often mentioned as their place of birth or permanent residence: Borshchiv, Chortkiv, Kopychynskyi, Buchach, Zbarazhsky povits (counties) of Poland, Kamianets-Podilsky, Orynynsky, Chemerivetsky, Pluzhnenny, Volochyskyi, Vinnytsia, Berdychiv, Mariupol districts of the Ukrainian SSR, the territory of the Russian Soviet Federative Socialist Republic (RSFSR). The detention on November 29, 1923 near the border post of Toky (nowadays Ternopil region) during an illegal border crossing of a native of the ethnic Greek village of Sartana (Mariupol district, Katerynoslavshyna, modern Donetsk region), mentioned in the interrogation protocol as “Yorko Howabits” is considered to be a striking example of the territorial spread of the phenomenon of illegal migration on the Zbruch section of the Polish-Soviet border (DATO, f. 316, d. 1, c. 322, p. 1).

**Conclusions.** Due to the study on the statistical sampling technologies of the phenomenon on the illegal migration on the Polish-Soviet border in the context of its social structure in the 1920s and 1930s, it was possible to trace a certain algorithm of the existence of “the Zbruch border”, since the internal political, social and economic changes in the USSR intensified illegal migration. In turn, it was accompanied by an increase in the rigidity of the totalitarian regime, strengthening of security and the actual closure of the state border. The above-mentioned approach will enable us to understand the reasons for the gradual intensification of

state border protection by the USSR simultaneously with the development of the processes of Sovietization, collectivization and nationalization of land, the Holodomor of 1932 – 1933 and political repressions of 1937 – 1939 (including the Polish nationals displacement from the border area, the autonomous Polish administrative units’ liquidation – Marchlewski (“Polski Rejon Narodowy im. Juliana Marchlewskiego” in the Ukrainian SSR) and Dzerzhinsky (in the Belorussian SSR) the Polish national districts, the Polish operation carried out by the People’s Commissariat of Internal Affairs – NKVD).

The Polish border service recorded illegal migration, mainly of the migrant workers at the initial stage of the border’s existence as it was directly related to the destruction of industry after the events of 1914 – 1921. The second important social category, as evidenced by the documents, were the soldiers of the defeated Ukrainian armies (and with them the Ukrainian, the Polish creative and national elite) or the soldiers who did not want to serve in the Red Army. Later on, the process of collectivization, the Holodomor and the fight against the Ukrainian nationalists (and the supporters of the restoration of the Russian Empire), the Bolshevik policy towards the church, changed the social portrait of illegal immigrants. The intelligentsia, the clergy, and the workers continued to flee the USSR. However, the majority of illegal migrants were the peasants, most often from border areas, who perceived crossing the border as a form of the political protest, an attempt to improve the economic situation, and sometimes the last resort for survival.

Thus, based on several classification criteria, we can conclude that the illegal migrants (refugees) on the “the Zbruch section” of the Polish-Soviet border in 1921 – 1939 were the representatives of many nationalities (the largest share was of the Ukrainians, the Jews, and the Poles), of different social status and confession, of different age categories and territories of origin. The interdependence of this classification with current political and economic phenomena in the USSR is visible: during the period of collectivization and the Holodomor of 1932 – 1933, the vast majority of the refugees were the peasants, and when the struggle against the church intensified, priests began to appear more often among the refugees. Taking into consideration some information on the place of refugees’ residence, we could state that it refutes the claim about the regional nature of the illegal migration on the Polish-Soviet border, since illegal crossing was carried out by both residents of border areas and immigrants from Ukraine, Russia and the First Czechoslovak Republic. Such diversity among illegal migrants may indicate the mass nature of the phenomenon under study, the social diversity among refugees, its importance as an integral part of the reality of the interwar period and outline further prospects for research into violations of the Polish-Soviet border regime.

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**PUBLIC AND CULTURAL ACTIVITIES OF UKRAINIAN NOTARIES  
IN GALICIA (THE END OF THE 19TH CENTURY – 1939)**

**Abstract.** *The purpose of the study is to elucidate the public work and cultural activities of the Ukrainian lawyers-notaries, their place in the public life of the Galician lands during the Austro-Hungarian Empire and the Polish state of the interwar period. The focus is drawn to undeservedly forgotten figures who, despite the professional ban on participation in public affairs, made efforts for the national development of the Ukrainian people. The research methodology is determined by the application of historicism and objectivity principles. In the research there have been used specific historical, historical comparative, biographical, and behavioral methods. The scientific novelty of the article consists in the need to fill the research gap regarding the place of Ukrainian notaries in the public life of the Ukrainians, to highlight and specify the participation of representatives of this legal profession in the public and cultural life of Galicia during the period under analysis, and to elucidate the reflection of their worldview in various forms of activity. Conclusions.* Thus, the process of the Ukrainian notary public development was correlated in time with the process of the rise of

the Ukrainian social movement in Galicia and the struggle for the national and political rights of the Ukrainian people. Therefore, the Ukrainian notaries were part of this movement, joining the activities of public societies, supporting the efforts of educational and cultural development of the oppressed people in their spare time. The work of the Ukrainian lawyers in the development of the notarial work under the conditions of the Austro-Hungarian and Polish states was determined by the existing bans for civil servants on the public manifestation of political and social views. But despite such restrictions, some notaries joined the active public life of Ukrainian societies at the workplace, demonstrating their commitment and support for the national development in various ways and forms. Such lawyers included notaries of different generations K. Telishevsky, I. Rudnytsky, V. Lushpynsky, L. Huzar, I. Hrabovensky, R. Zayachkivsky, etc. Carrying out their professional work, they expanded the field of use of the Ukrainian language in official records, supported or even headed educational societies, and made financial donations to public causes. Among the notaries, two bright literary figures stood out: V. Levytsky-Lukych and M. Mochulsky. For them, literary creativity, journalism, editorial and publishing activities became an integral part of their life path, a way of their own self-expression, which complemented the main legal work. These creative individuals reflected not only the contemporary reality in their works, but also demonstrated high examples of various genres of literary creativity.

**Key words:** Galicia, public activity, literary, notary, lawyer, "Prosvita".

## ГРОМАДСЬКА ТА КУЛЬТУРНИЦЬКА ДІЯЛЬНІСТЬ УКРАЇНСЬКИХ НОТАРІУСІВ В ГАЛИЧИНІ (кінець XIX – 1939 рр.)

**Анотація. Мета** – відобразити громадську роботу та культурницьку діяльність українських правників-нотаріусів, їхнє місце в суспільному житті галицьких земель часи австро-угорської імперії та польської держави міжвоєнного періоду. Увага привернута до незаслужено забутих діячів котрі попри професійну заборону участі у громадських справах доклали зусилля для національного розвитку українського народу. **Методологія дослідження** визначена застосуванням принципів історизму, об'єктивності. В ході дослідження використовувалися методи конкретно-історичний, історико-порівняльний, біографічний, поведінковий. **Наукова новизна** статті полягає в потребі заповненні дослідницької лакуни щодо місця українських нотаріусів у суспільному житті українців, висвітлення та конкретизації участі представників цієї правничої професії у громадському та культурному житті Галичини в окреслений період, відображення їхньої світоглядної позиції у різних формах діяльності.

**Висновки.** Процес розвитку українського нотаріату співвідносився в часі з процесом піднесенням українського суспільного руху в Галичині та боротьбою за національно-політичні права українського народу. Тож українці-нотаріуси були частиною цього руху, долучаючись до діяльності громадських товариств, підтримуючи зусилля просвітницького та культурницького розвитку пригнобленого народу у позаробочий час. Робота українських правників у розвитку нотаріальної справи в умовах австро-угорської та польської держав визначалася існуючими для державних службовців заборонами на публічний прояву політичних та суспільних поглядів. Та незважаючи на такі обмеження частина нотаріусів долучилася до активного громадського життя українських товариств за місцем праці, у різний спосіб та форми демонструючи свою прихильність та підтримку національному розвою. До таких правників належали нотаріуси різних поколінь К.Телішевський, І. Рудницький, В. Лушпинський, Л. Гузар, І. Грабовенський, Р. Заячківський та ін. Здійснюючи свою професійну роботу вони розширювали поле вживання української мови в офіційному діловодстві, підтримували, або й очолювали просвітнянські товариства, складали фінансові пожертви на суспільні справи. Серед нотаріусів виділялися дві яскраві літературні постаті – В. Левицький-Лукич та М. Мочульський.

Для них літературна творчість, публіцистика, редакторська та видавнича діяльність стали складовою їх життєвого шляху, способом власного самовираження, що доповнював основну юридичну роботу. Ці творчі особистості у своїх творах відображали не тільки тогочасну дійсність, але й демонстрували високі зразки різножанрової літературної творчості.

**Ключові слова:** Галичина, громадська діяльність, літературна, нотаріус, правник, "Просвіта".

**Problem Statement.** At the turn of the 19th and 20th centuries, the social and political life of the Ukrainian Galician lands within the Austro-Hungarian Empire witnessed an increase in the social importance of a new socio-professional class – the Ukrainian lawyers. The growing popularity of the legal profession among the Ukrainian youth of Galicia was the result of the society modernization, as well as the Ukrainian public movement activation, which entered the political stage.

Its representatives, especially lawyers, were legal defenders of the national and civil rights of compatriots in courts, occupied leading positions in the Ukrainian political and public life of Eastern Galicia, and became spokesmen for the rights of Ukrainians in the Austrian Parliament and the Galician regional Diet. Some Galician notaries became famous for their cultural activities, which they conducted during their spare time. Their participation in public life had all signs of demonstrating national solidarity, and their professional position testified to the general trend of expanding the right of the Ukrainians to use the Ukrainian language under foreign state and political regimes.

**Review of Recent Research and Publications.** The topic of the Ukrainian notary public development in Western Ukrainian Galician lands in the 19th and early 20th centuries was partially raised in the historical research of I. Luchakivska (Luchakivska, 2015), N. Mysak (Mysak, 2015), L. Shevchuk (Shevchuk, 2018), K. Kurylyshyn and M. Haliv (Kurylyshyn, & Haliv, 2024), Yu. Zemskyi and O. Trygub (Zemskyi, & Trygub, 2021). In these studies a chief focus is on the organization and legal regulation of the notary service in the Austro-Hungarian Empire, partly in the Polish Republic of the interwar period. Certain aspects of the literary work of Ukrainian notaries V. Levytsky and M. Mochulsky are presented in the articles by S. Yo. Kobuta and S. S. Kobuta (Kobuta, & Kobuta, 2021). The source basis of the article was the materials from state archives, published collections of documents and materials, and local history literature.

**Research Results.** The path to a legal career for a university graduate had a general algorithm – a mandatory one-year judicial practice, passing three state exams (ryhorozy), and professional practice in the specialization, which differed somewhat in terms of timing. The one-year mandatory judicial practice in a district or regional court (on a free basis) consisted of keeping court records, court documentation, and processing various court cases. Since 1911, a new law had delimited the judicial practice for candidates for judges, notaries and lawyers. The latter had to undergo a one-year internship in the district court and other county courts (of first instance) for 4 months. The subsequent course of legal practice, in accordance with the wishes of a candidate, was determined by the president of the Supreme Regional Court (for the Galician lands – the Lviv Regional Court).

The position of a notary was available after successfully completing a year of judicial practice and four years of notarial practice. The applicant was admitted to the position on the condition that he had passed at least two state exams or received a doctorate in law (doctor iuris utriusque). This degree was awarded after successfully passing three ryhoroz examinations. The exams were taken publicly and in an arbitrary order. If an unsatisfactory grade was received for one of the exams, it was allowed to be retaken after three months. In the case of two negative attempts, the applicant permanently lost the right to a doctoral degree (Luchakivska, 2015, p. 90).

The procedure for official acceptance for practice in a notary office provided for the immediate notification by the notary (patron) of the Lviv Notary Chamber of the fact of the intern's acceptance, after which his name was entered into the official list of notary candidates. After two years of practice, the candidate had the right to take the notarial exam,

which was considered a prerequisite for further career advancement. It was taken by a special commission consisting of the chairman, two members of the Supreme Regional Court and one active notary. After successful completion of the practice, the applicant received a certificate of completed notarial training issued by a notary and certified by the chamber (*Ustawa notaryalna*, p. 12).

This procedure enabled him to become an official candidate for the position of a notary, but there was often a problem with the place of service. Since the 1890s in Galicia, and in the empire in general, the number of vacancies remained small. To get the position of a notary, one often had to wait until the age of 18-20. This was due to a somewhat simpler procedure for admission to the service than, for example, to the court or the bar, so the number of applicants, especially among the Ukrainians, was greater than the actual places. Thus, as of 1894, in the Lviv appellate district, there were 147 candidates for 138 notary positions, while in Kraków district, this ratio was 74 to 87 (Luchakivska, 2015, p. 90).

The vacant position of a notary was filled on a competitive basis, which was conducted by the notary chamber. The competition was announced three times by advertisements in the press in Polish and Ukrainian. After that, the candidates submitted the relevant documents to the notary chamber. There, they made an offer to the county court district with a vacant position. After approval, the documents were transferred to the regional court, from there to the approval of the Minister of Justice. The latter adopted the appropriate decision. To ensure his activities, as well as to compensate for losses that could be caused by the notary as a result of his professional functions, he paid a deposit in cash or securities (*Ustawa notaryalna*, p. 15).

Officially, a notary did not receive any payment as a civil servant (such as a judge or prosecutor). For performing notarial acts, notaries charged fees at established rates, which were determined in the relevant notarial tariff rate. They formed their material income. Therefore, the above-mentioned complex procedure for obtaining the right to independent notarial activity had an obligatory nature for the candidate to fulfill his mission worthily and cherish the position received.

The appointed notary, before taking the oath, had to make a seal according to the appropriate model, which contained the following elements: the Austrian coat of arms (eagle), the notary's name and surname, his title, the name of the region and the location. The applicant submitted a certain number of sheets with imprints and his own signature to higher authorities.

The majority of the discovered documents contain imprints of personal seals of the Ukrainian notaries made in Polish. For example, the seal of J. Onyshkevych had the imprint "Josef Onyshkevych, c. k. notary in Zboriv in Galicia" (SALR, f. 369, d. 1, c. 391); on the seal imprint of V. Lushpynsky – "Volodymyr Lushpynsky, c. k. notary in Kosiv, in Galicia" (SAIFR, f. 508, d. 1, c. 1, 3, 12–17). In addition to the seal, a rectangular stamp was also used, which included the name of the notary or his deputy, the number and date of the decree of the Lviv Regional Court on the appointment, and the registration number of the certified document (SAIFR, f. 242, d. 1, c. 16, p. 211).

After that, he took the oath before the Lviv Regional Court or the relevant county court and received a decree on permission to begin his activities. The procedure for appointing notaries in the Ukrainian Galician lands, which was consistent with Austrian legislation, was preserved within the framework of the Western Ukrainian People's Republic (ZUNR) and in the interwar period during the existence of the Polish state.

If several languages were used in the notarial district, the regional court could provide the notary with confirmation in which language he should draw up notarial acts or perform notarial actions in each of the languages. From the analyzed archival files it can be seen that at the end of the 19th – the beginning of the 20th century the predominant language of drawing up notarial documents by the Ukrainian notaries was Polish. This is evidenced by the documents of V. Rudnytsky's office in Obertyn (SAIFR, f. 242, c. 10, 15), V. Lushpynsky's office in Kosovo (SAIFR, f. 508, d. 1, c. 1, 3, 12–17). But before the outbreak of World War I, under the influence of the growing legal activity of Ukrainian lawyers (primarily attorneys) regarding the use of the Ukrainian language in judicial institutions, the number of notarial documents in Ukrainian increased significantly. They are found in the office of Oleksandr Didytsky in Voinyliv (SAIFR, f. 255, d. 1, c. 41, 42; f. 256, d. 1, c. 2–6), Volodymyr Rudnytsky and his deputy (a notary candidate) Roman Zayachkivsky (SAIFR, f. 242, d. 1, c. 16).

The position of a notary was for life, but conditions were provided that made it possible to dismiss a lawyer: transition to the bar or another public position that could not be combined with notarial work; due to loss of Austrian citizenship; due to committing a criminal offense and receiving a court sentence; due to prolonged incapacity for duty caused by a serious mental or physical illness, etc.

In numerical terms, the number of notaries in general, and the Ukrainian notaries in particular, in the Galician lands was the lowest of the main legal professions. In the middle of the 19th century they were represented in individual county judicial districts and subordinated to the Lviv and Przemyśl notary chambers. There as well, representatives of the Polish and Jewish nationality prevailed, there were few Ukrainians. In addition, they were still burdened by the practice of ethnic ambivalence, reflected in the popular 19th century expression “gente Ruthenus, natione Polonus” (a Ruthenian by origin, a Pole by nation). Is that why the famous Ukrainian lawyer and politician K. Levytsky, characterizing the origins of the Ukrainian notary public, determined that at the end of the 19th century “this type of people... has already outlived itself and died out.” Instead, later our conscious Ruthenians (Ukrainians) came to the notary public” (Levytsky, 2014, p. 143). This trend was inherent in all legal specialties that Ukrainians sought to enter.

Some Ukrainians, while still students, acquired their first skills in public self-organization within the framework of the activities of the Ukrainian student societies “Sich” at the University of Vienna and the “Lawyers’ Circle” at the University of Lviv. The latter, established in 1881, was the result of the desire of the students of the law department “to organize our fellow lawyers for the future positions that they should occupy in the civic life of the Ukrainian people” (Levytsky, 2014, p. 29). Having acquired the appropriate specialty, they tried to combine professional work with public work, while maintaining friendly relations with their colleagues from their student days. Thus, a circle of public figures from among practicing lawyers was formed.

Among the nationally oriented Ukrainian notaries of the 1870s – 1880s, K. Levytsky singled out the names of Jo. Onyshkevych in Zboriv, later in Kolomyia, S. Budzynowski in Przemyśl, M. Moiseyovych in Zaliztsy and A. Kokurevych in Sianok. The younger wave consisted of V. Lushpynsky in Lviv and Kosiv, K. Telishevsky in Turka, then in Buchach, M. Bachynsky in Kalush, P. Yarymovych in Pidhaisi, Jo. Hromnytsky in Brody, V-M. Levytsky in Sniatyn (Levytsky, 1934, p. 144).

Among them, it is worth highlighting K. Telishevsky, who was a notary in Turka, later moved to Buchach. Working in the Carpathian Pidhirtsi, he was elected as an ambassador

(deputy) to the Galician Regional Diet (1889 – 1895) and the Austrian State Council (1891 – 1897). He also carried out active work at the county level, was deputy marshal of the county council (Chornovil, 2010, p. 185). His ambassadorial activities in the Sejm were highly appreciated by K. Levytsky, who characterized K. Telishevsky as a good organizer and an exemplary citizen. The lawyer himself was one of the ardent supporters of the course of understanding with the Poles within the framework of the “new era”. Speaking in the Sejm in 1890, he stated: “Give sincere and open support for the development of the Ukrainian (Ruthenian) nationality in the interests of the land and the state, and I will lay my head on the fact that such an understanding, which is based on our common interest, will also establish the well-being of the land, look for the path that would unite us, the Ruthenians and the Poles, so that my Ukrainian-Ruthenian people could find a guarantee that in the future they will become nationally educated, and that they will feel like a people equal in rights with the Polish people...” (Levytsky, 1934, p. 144).

In the public sphere, Jo. Onyshkevych and V. Lushpynsky also worked at this time. Jo. Onyshkevych received a nomination decree back in 1871, opening offices. In Zboriv, later in Kolomyia, at the beginning of the 20th century in Lviv. In all places of work, he participated in local branches of Ukrainian societies, supported cultural and economic events. Having a considerable public authority, he was elected a member of the supervisory board of the Dniester Society (Levytsky, 1934, p. 144).

A little later, V. Lushpynsky began his path to notarial practice. After practicing in Lviv, he worked as an assistant notary in Przemyśl for a year, after which he started his own business in Komarno. Eight years later, in June 1890, V. Lushpynsky moved his office to the mountain town of Kosiv, where he ran it for 12 years. In the last years of his work in the Carpathians, most documents were drawn up and signed by assistants, and V. Lushpynsky was often in Lviv (SAIFR, f. 508, d. 1, c. 16). In August 1902, he moved his office to Jaroslaw, and in the pre-war years he ran it in Przemyśl. He combined his professional work with participation in public affairs in the towns where he worked (Dilo, 1914, January 21).

I. Rudnytsky was also among the nationally conscious notaries. He is known not only for his public work in the towns of Ternopil, but also as the father of the Rudnytsky family, known in the politics and culture of Galicia: Mykhailo, Volodymyr, Ivan, Milena, Anton. His professional path and family pages of his biography were briefly reflected in his memoirs by his son Volodymyr Rudnytsky: “After studying law at Lviv University and military service in Infantry Regiment 55 and serving in the “Barefoot Campaign,” father began practicing law in Berezhany. But one year later, he left the court and moved to the notary public and, as a candidate, began practicing in Pidhaitsi, where my brother Mykhailo was born, then in Zboriv, where my sister Milena and I were born, later in Zolochiv, then in Khodoriv, where my brother Ivan was born, in Mykolayiv on the banks of the Dniester, Hrymailiv, and then, as an independent notary in Luka, where my brother Antin was born, finally in Berezhany, where he died prematurely on December 19, 1906...” (Storinky istorii rodyny Mileny Rudnytskoi, n. d.).

In 1881, 15 Ukrainian notaries worked in the territory of Galicia, holding the 138 notarial positions mentioned above. Three decades later, the situation did not fundamentally change. In 1910, there were only 19 Ukrainian notaries in the whole of Galicia, as indicated in the annual calendar of “Prosvita”. Geographically, there were two notaries in Kolomyia, one each in Lviv, Bolekhiv, Vynnyky, Voinyliv, Halych, Dolyna, Zaloztsy, Krakivets, Mykulyntsy, Nemyriv, Nowe Selo, Przemyśl, Pidhaitsi, Zoloty Potok, Rozhniativ, Skalat and Stara Sil (Iliustrovanyi narodnyi kalendar, 1911).

The notaries (like the judges) had the status of the civil servants under the Austrian law, unlike the lawyers, who were members of the liberal professions and had no regulatory obligations regarding their conduct outside of their professional activities. Consequently, the notaries were the subject to significant restrictions on the possibility of publicly expressing their political and social views, especially those that might differ from the generally defined conduct of a civil servant.

However, the Ukrainian notaries (as well as some judges) as part of the national movement activation still joined the activities of Ukrainian public societies, without particularly advertising it. There were cultural and educational societies “Prosvita”, the recreational societies “Ruska Besida”, the musical and song society “Boyan”, the cooperative society “Silskyi Hospodar”, “Narodna Torhivlia”, etc. among such structures. They paid membership fees (datky), participated in meetings, held cultural events. Their presence, especially, had a positive impact on the local Ukrainian intelligentsia and peasant representatives at the povit levels.

There were two young candidates for the notary public office, Lev Huzar and Volodymyr Levytsky, who began their notarial practice in the town of Bolekhiv almost simultaneously, and Huzar’s sister Olha became Levytsky’s wife in the early 1880s. L. Huzar, a graduate of Lviv University, soon moved to continue his internship in the towns of Yabluniv and Pechenyzhyn near Kolomyia, where he received the right to establish his own office. In 1908, he moved his office to Halych, where he lived and worked until his death in 1923. He is one of the most prominent Ukrainian notaries of the beginning of the 20th century, an active participant in all public and economic societies at the place of activity. Together with his wife, they owned significant land estates in Krylos near Halych, where they conducted multi-branch agricultural production. They had their own house, part of which was equipped as a trading store in Lviv. He was an active member of Stanislaviv branch of “Prosvita” and “Ruska Besida” Society, he was elected as a Councilor to Halych Town Council. He contributed to the organization of the local Ukrainian cooperatives and economic societies of the Ukrainian peasants. During the November Upheaval of 1918, he organised the transfer of power in Halych and the district to the local Ukrainian Committee, and served as the City Commissar of the Ukrainian state. His son Yaroslav was enrolled in the Ukrainian Galician Army, and his grandson Liubomyr Husar became a Cardinal and Metropolitan of the Ukrainian Greek Catholic Church during the times of independent Ukraine (Huzar, 2023, p. 360; Kobuta, 2018, p. 434).

Bolekhiv became the first place of internship for the young candidate for a notary Volodymyr Levytsky, where he found himself in the cultural and educational environment of the local parish priest of the UGCC, Ivan Ozarkevych, and his daughter Natalia Kobrynska. He dealt with the ethnographic and literary activities since he was a student (he took a pseudonym Vasyl Lukych). He was published in the magazine “Druh”, Lviv periodicals “Lastivka”, “Dilo”, “Pravda”. In the 1880s, it was V. Levytsky-Lukych, who became the Editor-in-Chief of illustrated calendars and almanacs published under the by the “Prosvita” Society. In 1880, he published the article about the folk poetess Marusia Churai in the magazine “Zoria”, and in 1881, together with I. Franko and I. Beley, he published “Rus’ka Anthologia”. There was also published a popular legal guide for the peasants, which was called “Rus’kyi Pravotar Domovy” together with a judge Julian Selsky.

In 1890 – 1896, the lawyer took on one of the most important areas of literary work – editing the literary and scientific periodical “Zoria”. Due to V. Levytsky, the periodical turned into an all-Ukrainian printed organ of public creative thought, became a platform

for the defense of the Ukrainian culture and Ukrainian living word persecuted in Russia. There were published the works of diverse authors from Naddniprianshchyna region in the periodical “Zoria”, who later became the prominent Ukrainian writers, and this contributed to strengthening the ties between Galicia and Naddniprianshchyna region. In addition to the literary and editorial work, V. Levytsky-Lukych conducted extensive publishing activities. He published diverse works by such Naddnipriansky Ukrainian writers as I. Nechui-Levytsky, B. Hrinchenko, P. Myrny, O. Konysky, M. Kotsiubynsky, and a complete collection of works written by S. Rudansky. In this way, he contributed greatly to the spread of the Ukrainian literature among the Galician Ukrainians and promoted the development of Ukrainian publishing (Dilo, 1938, October 8).

He carried on his notarial training in Stryi and Stanislaviv in parallel, and he worked for some time as an assistant to a notary in Stanislaviv. In 1896 he established his own notary office in Vynnyky near Lviv, where he worked until his release by the Polish authorities in 1933. He continued his literary, ethnographic, and philosophical research. The following works stand out as the significant ones of a historical and philosophical nature: “Zakordonna Rus” (Rus Abroad), “Uhorska Rus (Hungarian Rus), Its Development and Current State” (1886), “How the Ukrainian People Live in Austria” (1915), “Thoughts about Life” (1928), “The Main Principles of Modern Astrology” (1934), “Freedom of Will in the Light of Modern Physics” (1936), “Religion and Science: Easter Thoughts” (Andrusiak, 2009, p. 86).

Another Volodymyr-Max Levytsky was engaged in the notarial work in Halychna at the same time as V. Levytsky-Lukych. He completed his notarial practice in the town of Sniatyn, in 1886 he was appointed a notary by Decree of the Minister of Justice, and ran offices in Vyshnivchyk and Kozova, Berezhany Povit (SALR, f. 369, d. 1, c. 321).

Ivan Hrabovensky became an active notary in the town of Dolyna at the beginning of the 20th century. He was the organizer, the first Chairman and a long-time Head of the district branch of “Prosvita”. He also participated in the creation and work of almost all economic societies in Dolyna, and he was among the founders and leaders of the local sports societies “Sokil” and “Sich” (Istorya Dolyny, 2015, pp. 86, 88, 111–112). Mykola Antonovych, his pupil, the Ukrainian diaspora lawyer said the following: “...as a sincere, honoured Ukrainian, who from being Grade 5 student worked under poor conditions for the good of the Ukrainian people, all societies, all institutions that were in Dolyna povit are the work of that man, and as a sincere Ukrainian, and he did it not for money” (Yarych, 2003, p. 25)

The following notaries worked during the pre-war period until 1914: Mykhailo Danylovych (Turka), Roman Bachynsky (Lisko), Ivan Meleshkevych (Nyzhankavychi), Teodoziy Pelevych (Stanyslaviv), Omelian Lipytsky and Yulian Tselevych (Uhniv). K. Levytsky noted the following while he was evaluating the overall activity of notaries at that time that “the notarial estate in our country had its own outstanding people, but for the most part did not go far beyond the notarial duties in civil life, and as we know from experience, did not preserve the rights of the Ukrainian language in its governance as it should have” (Levytsky, 2014, p. 145).

There could be seen significant changes in the use of the Ukrainian language among some notaries in the territory of the present Ivano-Frankivsk in the analysed archival materials. It was typical of the above-mentioned L. Husar, and some of the notarial acts of O. Didytsky in Voynyliv, V. Rudnytsky and his assistant R. Zayachkivsky in Obertyn were also drawn up in Ukrainian.

The last notary candidate Roman Zayachkivsky was the son of the former prominent Ukrainian judge Tyto Zayachkivsky, a Court Counselor, who during the pre-war period

became a lawyer and ran a law firm in mountainous Yabluniv. R. Zayachkivsky chose the profession of a notary, and practiced in the office of V. Rudnytsky. He took an active part in gaining power in Kolomyia, and was appointed as the City Commissar of Kolomyia and ensured state-building processes in Kolomyia povit when the ZUNR emerged. He was arrested by the Polish authorities after the defeat of the ZUNR. He was given the opportunity to establish a notary office in Nadvirna, where he worked until he was released by the Poles as unreliable in the mid-1930s. He was the Head of the povit “Prosvita” and a member of many Ukrainian societies, including the Povit Committee of the Ukrainian National Democratic Union. He supported the organisation of cultural events by the Ukrainian activists financially. He was elected to Nadvirna Town Council. During the German occupation in 1941 – 1944, he was the Head of the Notary Chamber in “Galicia” district. He emigrated to the USA (Kravtsiv, 1975, pp. 631, 816, 818; Ukrainsky holos (Myunhen), 1949, June 16).

The notarial activity of the Ukrainian lawyers was subjected to further oppression under the conditions of the Polish state. Lviv Notary Chamber initiated a kind of audit of the behaviour of acting notaries during the times of the ZUNR, their loyalty to the Polish authorities, and the prospects for filling vacant positions. It was emphasized that it was necessary to take into account the behaviour of the candidates for positions during the Ukrainian authorities, and the position of the Ukrainians – how and in what way they expressed negativity towards the Polish community (SALR, f. 369, d. 1, c. 1, pp. 1–2).

The notaries were prohibited from political activities and participation in the public or cultural life of their own people by practical actions of both the Polish administration and the judiciary. The restriction applied to both lawyers active since Austrian times and potential applicants for the notarial profession. An example is the story of the candidate for a notary Ivan Sokhatsky. A graduate of Lviv University, one of I. Bobersky’s closest associates in the development of the Ukrainian gymnastic movement in Galicia, a member of many Ukrainian societies in Kalush in the pre-war period, in 1920 – 1921 he underwent official practice in the office of O. Didytsky in Voynylów. In 1921 he opposed the holding of elections to the Polish authorities in Ukrainian lands, for which he was arrested and imprisoned for 21 days. The path to the notary’s office was closed. In 1925, after completing his law practice, he received the right to establish a law office in Kalush, but for another two years he was persecuted by the Polish prosecutor’s office for manifesting his national position (CSHAUL, f. 151, d. 1, c. 1703). He became an active “organizer of the povit”, took care of the development of the economic and cooperative movement, was the Head of the Povit Committee of the UNDO, and the director of the branch of the Ukrainian Bank.

A similar situation arose with Yaroslav Hrynevych. A former Sich rifleman and participant in the military struggle for the Ukrainian statehood, the son of the writer Katry Hrynevych, he received a law degree. While undergoing notarial practice in Bohorodchany, he was also accused of a pro-Ukrainian position, participation in public life and was not allowed to take the notary exams. He became a lawyer, worked in Nadvirna, continuing his community service (Hrynevych, 1968).

Despite such trends, the Ukrainian legal community continued to demonstrate public and national solidarity. An example is the position of the Ukrainian lawyers of Stanislaviv, who supported the functioning of the city cultural society “Ruska Besida”. There were about 30 active Ukrainian members lawyers: judges, lawyers, notaries. Those were: L. Huzar from Halych, the notary from Bohorodchany P. Zhukovsky, the Deputy Notary T. Budzynovsky and candidates O. Lisykevych, I. Medvid, O. Melnykovych. In addition to the traditional

literary and entertainment evenings, charitable casinos were organized, where the funds collected during the game were transferred to the public needs of the Ukrainians (Kravtsiv, 1975, p. 621).

A special place among Ukrainian notaries in the field of literary creativity belongs to the literary critic, scholar and writer Mykhailo Mochulskyi (1875 – 1940). His professional career was typical of a Ukrainian lawyer of Austrian times. After graduating from Lviv University, he chose the specialisation of a notary, underwent relevant practice in notary offices in Lviv, Sianok, Mykolayiv on the banks of the Dniester, and received a doctorate in law. Before the war, he worked as an assistant notary in Lviv. During the Russian occupation, he was arrested and deported to Russia. When there emerged the Ukrainian People's Republic he worked as a lawyer-notary in the auxiliary staff of the delegation of the young state, he participated in the preparation and signing of the Brest Peace Treaty of 1918 with Germany and Austria-Hungary. He returned to Galicia, worked as a notary in the cities of Hrymailiv, Ternopil, and from 1933 in Stanislaviv (Doroshenko, 1942).

While in Lviv, he became a member, later Director, of the Ukrainian Publishing Union, an employee of the Literary and Scientific Bulletin, a member of the National School of Literature, and its manager. He tried his hand at artistic writing as a poet and fiction writer. But he contributed most to the literary work. He is the author of many critical and literary works devoted to the works of T. Shevchenko, I. Franko, Kh. Alchevska, U. Kravchenko, O. Kozlovsky and the others. M. Mochulsky's reviews combined two basic approaches: the affirmation of realistic tendencies in literature and the criticism of decadent trends. Among his research, it is worth highlighting the book "Bronze Bust" (1931) about the first collector of the Ukrainian thoughts Tsertelev and the poet and ethnographer Manzhuza. The book about the creative heritage of I. Franko "Ivan Franko. Studies and Memories" (1938) was profound in content. In 1936, he also published a collection of his own stories for children "Opaleva Mriaka" (1936) (Doroshenko, 1942).

**Conclusions.** Thus, the process of the Ukrainian notary public development was correlated in time with the process of the rise of the Ukrainian social movement in Galicia and the struggle for the national and political rights of the Ukrainian people. Therefore, the Ukrainian notaries were part of this movement, joining the activities of public societies, supporting the efforts of educational and cultural development of the oppressed people in their spare time. The work of the Ukrainian lawyers in the development of the notarial work under the conditions of the Austro-Hungarian and Polish states was determined by the existing bans for civil servants on the public manifestation of political and social views. But despite such restrictions, some notaries joined the active public life of Ukrainian societies at the workplace, demonstrating their commitment and support for the national development in various ways and forms. Such lawyers included notaries of different generations K. Telishevsky, I. Rudnytsky, V. Lushpynsky, L. Huzar, I. Hrabovensky, R. Zayachkivsky, etc. Carrying out their professional work, they expanded the field of use of the Ukrainian language in official records, supported or even headed educational societies, and made financial donations to public causes. Among the notaries, two bright literary figures stood out: V. Levytsky-Lukych and M. Mochulsky. For them, literary creativity, journalism, editorial and publishing activities became an integral part of their life path, a way of their own self-expression, which complemented the main legal work. These creative individuals reflected not only the contemporary reality in their works, but also demonstrated high examples of various genres of literary creativity.

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**PHOTOGRAPHY AS A SOURCE FROM THE HISTORY OF EVERYDAY LIFE  
UKRAINIAN EMIGRATION IN INTER-WAR CZECHOSLOVAKIA**

**Abstract.** The article focuses on the analysis of the photography documentary potential as a visual source for studying the everyday life of Ukrainian intelligentsia in emigration in the Czechoslovak Republic during the interwar period. **The purpose** of the article is to reveal the possibilities of using photography as a visual source for learning and understanding of the everyday life of Ukrainian intellectuals under conditions of physical separation from their homeland, while at the same time they

were full of hope for a return to the restored Ukrainian state. **The methodology of the research** involves an integral combination of research tools and methods from several socio-humanitarian disciplines, in particular history, sociology, cultural studies, etc. At the same time, the historical and anthropological approaches of the analysis require reliance on special methods of studying everyday life, in particular according to the phenomenology of A. Schutz, and theoretical and methodological recommendations of visual sociology by P. Sztompka. The main volume of photography comes from the "Prague Archive", which was consciously formed by the emigrants themselves. After the end of the war, it was transferred to Ukraine under the reparations programme. The Soviet special services censored it, partially destroyed it and distributed it to Central State Archive of the Higher Authorities of Ukraine, Central State Archive of Public Organizations and Ukrainian Studies, H. S. Pshenychny Central State Film, Photo and Audio Archive of Ukraine, Central State Audiovisual and Electronic Archive. The archival collections are supplemented by family albums and private collections. The subject area of the article includes photographs of socio-anthropological content, which reflect the public and professional activities of emigrants, socio-cultural events, education, as well as the family and private world, leisure, recreation, entertainment, travel, etc. **The scientific novelty** of the publication consists in the fact that it attempts to analyze photographs as visual evidence of an everyday life of the intelligentsia in emigration, not limited to their representative, obvious (factual) eloquence regarding the material side of life, but also to reveal their deep symbolic potential for tracking value and axiological characteristics, social attitudes that determined the meanings of the emigrant community's existence. **Conclusions.** From the available photographs, we can draw conclusions not only about the material side of the everyday life of emigrants, but also about their moods, experiences, emotions, trace the intentions and goals of their activities, analyze the degree of their social adaptation, the ability to accept challenges and the ability to communicate in new circumstances, establish cultural consumption, and clarify taste preferences. The objects of daily use in private space and during public and cultural events recorded in the photographs reveal the desire to preserve one's national identity and contribute to the restoration of the Ukrainian statehood.

**Key words:** Ukrainian intelligentsia, emigration, everyday life, photography, visual documents, Prague archive, Museum of Liberation Struggle of Ukraine, personal sources, informational and memorial functions of photographs.

## ФОТОГРАФІЯ ЯК ДЖЕРЕЛО З ІСТОРІЇ ПОВСЯКДЕННЯ УКРАЇНСЬКОЇ ЕМІГРАЦІЇ У МІЖВОЄННІЙ ЧЕХОСЛОВАЧЧИНІ

**Анотація.** У статті розглянуто документальний потенціал фотографії як візуального джерела для вивчення повсякденного життя української інтелігенції в умовах еміграції в Чехословацькій республіці у міжвоєнний період. **Мета статті** полягає у розкритті можливостей використання фотографії як візуального джерела для пізнання і розуміння повсякденного життя українських інтелігентів в умовах фізичної відірваності від батьківщини, які сподівалися на повернення у відновлену Українську державу. **Методологія** розгляду заявленої теми передбачає інтегральне поєднання дослідницького інструментарію та методик кількох соціогуманітарних дисциплін, зокрема, історії, соціології, культурології тощо. Водночас історико-антропологічна оптика аналізу вимагає опертя на спеціальні методики дослідження повсякденності, зокрема за феноменологією А. Шюца, та теоретично-методологічні рекомендації візуальної соціології від П. Штомпки. Основний масив світлин походить з «Празького архіву», який був свідомо сформований самими емігрантами. Після закінчення війни він був переданий в Україну за програмою контрибуції. Радянські спецслужби піддали його цензурі, частково знищили і розподілили в ЦДАВО України, ЦДАГОУ, ЦДКФФА України ім. Г. Пшеничного, ЦДАЕА. Архівні колекції доповнюють сімейні альбоми і приватні збірки. У предметному полі статті – фотографії соціо-антропологічного наповнення, в яких відображена громадська і фахова діяльність емігрантів, соціокультурна подієвість, навчання, а також родинно-приватний світ, дозвілля, відпочинок, розваги, мандрівки тощо. **Наукова новизна** публікації полягає у тому, що в ній робиться спроба проаналізувати світлини як візуальні свідчення повсякдення інтелігенції в умовах еміграції, не обмежуючись їх репрезентативною очевидною (фактографічною) промовистістю щодо матеріальної сторони життя, але й розкрити

їхній глибинний знаково-символічний потенціал для відстеження ціннісних і аксіологічних характеристик, соціальних установок, що й визначали смисли буття еміграційної спільноти.

**Висновки.** За наявними фотографіями можна робити висновки не тільки про матеріальний бік повсякденного життя емігрантів, але й про їхні настрої, переживання, емоції, простежувати наміри і цілі діяльності, аналізувати ступінь їхньої соціальної адаптації, вміння приймати виклики і здатність комунікації в нових обставинах, налагоджувати культурне споживання, з'ясовувати смакові уподобання. За зафіксованими на фотографіях предметами щоденного користування в приватному просторі і під час громадсько-культурних заходів простежується прагнення зберегти свою національну ідентичність і зробити внесок у відновлення української державності.

**Ключові слова:** українська інтелігенція, еміграція, повсякденне життя, фотографія, візуальні документи, Празький архів, Музей визвольної боротьби України, особові джерела, інформаційна та меморіальна функції фотографії.

**Problem Statement.** The relevance of the research is due to, on the one hand, a growing importance and influence of visual information in all spheres of socio-political life, and on the other hand, the needs and strategies of historical and anthropological methodology in modern Ukrainian humanities, in general, and in the history of everyday life, in particular. To elucidate the complexity of the stated issue actualization, we will present the following arguments.

Firstly, at the present stage the volume of visual information is not only qualitatively and quantitatively dominant, but it also serves as the most powerful cognitive channel for acquiring knowledge, its assimilation, understanding and interpretation. In modern society, visual perception of all phenomena, events and processes, owing to the spread of digital technologies, actually replaces verbal, descriptive reception, which requires adjustments in the source study of the socio-humanitarian cycle sciences (Papakin, 2021, p.162).

Secondly, the visual turn led to the emancipation of images, their liberation from the requirement to behave like verbal texts. Thus, historical photography among visual media ceased to be accepted as a purely additional illustration of a verbal narrative, instead its possibilities as a self-sufficient document require special focus and professional reading, since they contain not only obvious information, but also their own narratives, ideologies and ways of constructing reality.

Thirdly, among the priorities of modern domestic historiography, the need to rethink the history of Ukrainian emigration in the 20th century as part of the national liberation struggle for the restoration of Ukrainian statehood from the Soviet occupation, rather than as a separate part of national history, has become evident.

Fourthly, the forced emigration of the Ukrainian conscious intelligentsia due to the defeat of the National Liberation Struggle of 1917 – 1921 fundamentally determined the existential framework of its everyday life, the fundamental dimensions of which remained the ideas of freedom, responsibility, and the meaning of life in the service of Ukraine. Therefore, the history of everyday life enables us to trace at the micro level how emigrants preserved their national and social identity, relying on the mental structures of consciousness, and how they responded to the challenges of modernity.

Finally, despite the huge array of photographs from the history of the Ukrainian intelligentsia of interwar Czechoslovakia, preserved in state archives, museums and private collections, the array of photographs has not been sufficiently used and analyzed. An excellent example of the processing of visual documents is the article by I. Sribniak and H. Khlebina about the daily life of interned Ukrainian Army soldiers in Liberec. It emphasizes the purposeful

creation of photo documents: “On January 20, 1921, the photographic section (circle) of the Communist Party of Ukraine (Cultural and Educational Circle – *Authors*) began its work, the purpose of which was defined as: a) nurturing the photographic art (art – *Authors*) in general; b) illustrating events of interest to our history and the history of culture; c) collecting materials for the Ukrainian photo terminology” (Sribniak, & Khlebina, 2019, p. 154). To implement these tasks, they set up a workshop, organized courses, established a specialized library and reading room, and even took care of “the publication of Ukrainian photographic textbooks and magazines”. Owing to the help of the Czech camp commandant, the members of the historical and photographic sections collected a lot of materials on the history of the Ukrainian Anti-Academia, which were concentrated in the camp archive. In the following article, the authors focused on everyday life in Josefov (Sribniak, & Khlebina, 2023), also did not bypass visual sources (Photo 1). Currently, the photo albums are in the Central Archives of the Ukrainian Academy of Sciences.

For a researcher of emigration everyday life, the potential of photographs is multi-representational for revealing and understanding socio-cultural life – from basic material needs to self-realization under extraordinary conditions. They are an important historical source for understanding the realities of intellectuals’ life under extraordinary conditions of forced emigration. Photographs created in the context of a community breakup directly reproduce evidence in a factual and representative plane, but, most importantly, they are provided to trace the unbreakable ideological integrity of national elites on both sides of the border, at least its best representatives, in establishing and maintaining memorial communication between generations.

**Review of Recent Research and Publications.** The issue of photography informativeness has been studied in visual studios, both foreign and domestic quite comprehensively and thoroughly. To substantiate the theoretical and methodological foundations of the use of photographs in the historical analysis of emigration everyday life, we rely on the visuality analytics of famous European authors. The majority of them give photography its due in the field of memory (memoir and memorial) and in the creation and reproduction of images of the past. In particular, according to Z. Kracauer, photographs are “mediums of memory” (Kracauer, 1963); according to P. Nora – “places of memory” (Nora, 2014). In R. Barthes’ semiotics, photographs are not just images of reality, but a system of signs that transmit not only the visible (direct, objective), but also the hidden (cultural, ideological) (Barthes, 2022); V. Benjamin considered photography as a means of knowing the world and changing its socio-cultural paradigms (Benjamin, 2002); according to P. Bourdieu, photo practices are a means of social integration, in particular, intergenerational communication (Bourdieu, & Wacan, 2015).

Among the Ukrainian researchers who studied the issue of visual informativeness, one should mention O. Briukhovetska, O. Karlina, O. Kovalevska, O. Koliastruk, etc. O. Briukhovetska, in particular, warns researchers of the danger of reducing photographic images to “small visual speeches”, since “between photography and reality there are indeed many codes, and not only cultural (which Barthes spoke about), but also technical” (Bryukhovetska, 2025, pp. 289, 290). According to O. Koliastruk, photographs occupy a leading position among visual sources in the study of history, as they have a rather powerful information potential and represent a rich visual image of the past. Photographic documents are a unique source that not only reveals the facts and events of antiquity recorded by the camera to the historian, but also enables reconstructing and representing

the history of a certain era, both of society as a whole and an individual person (Koliastruk, 2008, pp. 260, 264). Her opinion is supported by O. Karlina: “In the reconstruction of everyday life, verbal texts can even be inferior to pictorial and material sources” (Karlina, 2024, pp. 130–131). O. Kovalevska emphasizes that visual images are a special type of text that requires decoding within the discourse in which it arose; they should be considered as self-sufficient sign systems (Kovalevska, 2018, p. 231).

**The purpose** of the article is to elucidate the possibilities of using photography as a visual source for learning and understanding everyday life of Ukrainian intellectuals under conditions of physical isolation from their homeland.

**Research Methodology.** The issue under analysis involves an integral combination of research tools and methods of several socio-humanitarian disciplines, in particular history, sociology, cultural studies, etc. At the same time, the historical anthropological optics of analysis requires reliance on special methods of studying everyday life, in particular according to the phenomenology of A. Schutz (Schutz, 1970), and theoretical and methodological recommendations for visual sociology by P. Sztompka (Sztompka, 2005).

**Research Results.** Owing to the images preserved in photographs: people, things, events, places – the distant past, which we have never seen, becomes visible and can “come to life” in our imagination. According to Z. Kracauer, photography itself is a reflection of society development level, in particular its practically material life, and at the same time serves as a means of preserving and depicting time that has irrevocably passed. Photography represents (with varying degrees of completeness and reliability) the objects recorded on it. Its direct visual eloquence, on the one hand, and the language of minor trifles and details as signs and symbols of time, on the other, provide the opportunity to create images of time from things (Kracauer, 1963, pp. 8, 33).

It is no coincidence that P. Nora referred to photographs as “places of memory” – as material loci containing the past. Photographs as frames of situations and phenomena, in his opinion, do not simply reflect people and events, but also act as active communicators between the past and the present (and therefore the future), evoking emotion and prompting reflection.

This “open meaning” R. Barthes designated with a special neologism *punctum* (literally: a puncture, a cut). In his essay “Camera Lucida”, he, developing the phenomenology of a photographic image, considered its two aspects – *stadium* and *punctum*. The vast majority of photographs, in which a fragment of reality is simply recorded, but there is no moment of touching the elusive meaning, are located at the *stadium* level. The same photographs (of which there are usually not many) that rise above the everyday and touch on the mythical moment of a unique event contain that elusive *punctum* that amazes and excites a viewer”. It is precisely because of the *stadium* that I am interested in many photographs, because I perceive them as political evidence, because I savor them as solid historical canvases; in these figures, faces, gestures, decorations and actions I participate as a person of culture (this connotation is contained in the word *stadium*). Instead, the second part shatters the *stadium* ... and like an arrow flies off the stage and pierces me. There is a word *punctum* to denote this wound, a puncture, a mark made with a sharp instrument; this word suits me all the more because it refers to the idea of punctuation; the photos are sometimes even oversaturated with these sensitive points; they are precisely the marks and wounds” (Barthes, 2022, pp. 17, 19–20).

For a historian, photography is not only a carrier of factual information, but also a spokesman for the development of social dialogue, the culture of social relations, priorities and values, and the fundamental principles of social existence both at the level of official discourse of the authorities and in the everyday practices of ordinary people who oppose it or, conversely, tolerate and support it at the grassroots level. Thus, as “a place of memory” for a historian, photography works in “three senses – material, symbolic and functional” and these “three aspects always coexist” (Nora, 2014, pp. 99–108).

First of all, photographs are able “to turn on” the cycle of time: what was considered important in the past and was chosen for recording by a photographer “appears” each time in the enduring future, in the reflections of the fluid multitude of present moments. Photographs transform the past into the object of consumption. The task that photographs “perform” is to make visible the past that is invisible right here, in the present. In this way, they express the frozen outlines of people and things that declare themselves, whether they are interpreted or not. Actually, the practice of photography, according to P. Bourdieu, served as a kind of protection against the flow of time and expressed a desire for communication (through the subsequent demonstration of the photograph to the audience), it is also the realization of the individual’s selfhood (in particular, through the genre of photo portrait), it is also a way of minting social prestige (official photo fixations), it is also a form of entertainment or escapism (Bourdieu, & Wacan, 2015, p. 32).

In the historical biography of photographs, it is customary to distinguish three stages. The invention of the camera is recognized as a fundamental moment in the progress of visualizing history. The pioneering role of photography in the formation of historical visual documentary was convincingly outlined by J. Ruby and M. Banks in their work “History of Visual Anthropology”. According to their analysis, during the first century of the “scientific biography of photography”, the colonial view remained dominant, when researchers filmed everything. Since the advent of the daguerreotype, interested people had perfectly understood the specificity of a new expressive medium, recognizing a camera’s unsurpassed ability to record, reflect and reveal visible physical reality. From that time on, photography began to be called “a mirror endowed with memory” (Kracauer, 1963, pp. 23, 25).

Since then, photographs had taken on the role of a self-evident, trustworthy document, with a potential not only informative but also commemorative. It is no coincidence that this period went down in history as “a rescue ethnography”, initiated by photography and later technically enhanced by cinema. At this stage, the camera became an obligatory and indispensable tool for Western anthropologists who sought to capture as much information as possible about the original world of the indigenous peoples of the colonized world. On the other hand, under the pressure of industrial urbanization, the traditional peasant way of life was deformed, and the rural way of life with its customs and rituals, everyday practices, things and utensils was rapidly declining.

According to V. Benjamin, the emergence of photography changed the dominant in cognition. After all, it reoriented a person (researcher, writer, artist, ordinary observer) “from the dictates of the hand, which records reality by means of letters and paints, to the power of the eyes, which observe the world through the lens: ... photography for the first time freed the hand during artistic reproduction from the most important creative duties, which from now on passed to the eyes, which look into the lens” (Benjamin, 2002, p. 124).

During the first hundred years, the positivist paradigm (W. G. F. Talbot) dominated the evaluation of photography. In the 1930s – 1980s it was replaced by the modern concept

(W. Benjamin), when reportage documentary (for cinema – a directorial plot) prevailed. The fixation of the visible was carried out with the sincere aim of truthful documentation, but according to a predetermined task, scripted / selective view of a photographer or operator from outside / above, removed from the object of filming. Reportage photographs and documentary films of this time left rich evidence, but they were partly linear and incomplete, since the optics of the object of observation itself was excluded from them in advance.

Only since the 1990s a democratic approach to the relationship between the object and the subject of research has begun to spread. Finally, in the 21st century, a pluralistic, tolerant view of collecting visual information has been established. Thus, the structuralist concept (R. Barthes) has been established in the theory of photodocumentary studies.

The mass of photographs of the Ukrainian emigrant intelligentsia in Czechoslovakia during the interwar period was formed at the intersection of the first and second stages of photodocumentary and, accordingly, has their features. But before talking about these photographs, it is worth recalling what the Ukrainian emigration centre in the Czechoslovak Socialist Republic was. It was almost the main centre of Ukrainian political emigration, whose activities were carried out through the mediation of more than fifty Ukrainian organizations and institutions, dozens of Ukrainian publishing houses, editorial offices of the Ukrainian magazines, around which dozens of highly educated specialists, patriots of the Ukrainian cause (Photos 2, 3).

According to the evaluation of the well-known researcher of emigration archives M. Palienko, "...despite the complexity and ambiguity of the situation, in the early 1920s Prague was the best place for the development of the activities of the Ukrainian museum and archival centre, firstly, due to the favourable political situation and positive attitude towards emigrants by the government of Czechoslovakia, and, secondly, due to the movement of a significant number of emigrants to Prague and the formation by them of a number of cultural, educational, scientific, professional and other organizations and institutions" (Palienko, 2008, p. 110). The Ukrainian emigrants outside their native lands did not give up hope and did not give up the cause of restoring the Ukrainian independence, all the time they worked to preserve their identity and carefully accumulated it both in active actions and archival and museum documentation. Hence the articulated awareness of the value of photographs of various types (officially documentary and amateur, private and corporate). In addition to educational and scientific activities, "each of these organizations, editorial offices and institutions had its own archives. It was assumed that after the emergence of independent Ukraine, they would be transported to their native lands, where they would serve in the construction of a new state" (Mushynka, 2000, pp. 532–545).

In the interwar Czechoslovakia, photography became widespread. The most popular among emigrants was the stereoscopic camera "Compur" from the German company "F. Deckel", since its rental was low (up to 25 hellers per day). Such cameras were used by journalists and museum workers. It is also recorded that students of the UHA used it during their internships in Poděbrady. Thus, on Forest Day (April 2), future foresters planted areas above the Labe River with certain types of trees, and then monitored their growth and development using camera and photo cards (Zubko, & Kotsur, 2025, p. 166). (Photo 4)

Prague was also a powerful educational centre of emigration, the Ukrainian Free University (1921 – 1945), M. Drahomanov (1923 – 1933) Ukrainian Higher Pedagogical Institute, the Ukrainian Academy of Plastic Arts (1923 – 1942) operated there; and in Poděbrady, professors and students worked at the Ukrainian Economic Academy (1922 – 1935), the Ukrainian

Technical and Economic Institute (1932 – 1945); the Ukrainian Gymnasium operated (1925 – 1945) in Modřany (Narizhny, 1999). Analyzing their verbal and visual archival documents, researchers conclude that educational institutions “considered knowledge as a factor of socio-economic well-being and confirmed the trend of increasing the influence of scientific, educational and cultural potential on the deepening and consolidation of national consciousness, social organization and activity of the Ukrainians in the development of the struggle for the independence of their homeland. The education of future specialists was aimed at rebuilding the national economy and the new Ukrainian state, serving the interests of the nation and society” (Shulha, 2019, p. 114).

The Ukrainian intelligentsia in emigration (despite all the contradictions in ideologies and beliefs) from the very beginning stood out as a nation-oriented community, interested in restoring statehood, consciously separated itself from the Russian emigration, and gravitated towards a self-sufficient constructive life.

The value of photo-documentary support for the reconstruction of the interwar past is evidenced by the letters and memoirs of many emigrants, especially when they found themselves in the aggression whirlpool unleashed by the Nazis and acutely felt defenselessness and fragility of a harmonious everyday life. It is no coincidence that at the very beginning of the 1940s V. Miyakovsky emphasized: “The life and cultural work of the Ukrainian emigration in Prague must be seen, to believe, that something like this is really possible” (Narizhna, 2010, p. 81) – we read such a remark in the memoirs “Children’s Eyes” by N. Narizhna, which she wrote at the beginning of the 21st century. (Photo 5)

N. Narizhna’s remark about visual documentary is not a random phrase or an illustrative tribute to popular historiography. This statement indirectly reflects her mention of the work of her father, Symon Narizhny, who, as the head of Museum of Liberation Struggle of Ukrainians in Prague, under the conditions of the war did his documentary research work “Ukrainian Emigration: Cultural Work of Ukrainian Emigration between the Two World Wars”. Apparently, to update the accumulated knowledge, to verify his own memories, he relied on numerous video documents of the Museum of the Liberation Struggle of Ukrainians entrusted to him and the Ukrainian Historical Cabinet at the Ministry of Foreign Affairs (MFA) of Czechoslovakia. The first part of his research was published with some photographs in Prague in 1942. He did not have time to publish the second part, it was published later. According to M. Mushynka’s calculations, this edition is illustrated with 228 photographs (Mushynka, 2005, p. 109).

A review of special historical studies on the Ukrainian emigration confirms that nowadays historians have a fairly representative photo archive of the lives of emigrants. This set of photographs is diverse in terms of photographs creation, their genre, and the method of their preservation.

If we talk about photographs of a socio-anthropological content (people in professional and family-private spheres, socio-cultural events, leisure and recreation, entertainment, education, etc.), which make up the subject field of our article, then it is worth highlighting two components: a) archival photographs from the funds of the Central State Academic Opera and Ballet Theatre of Ukraine, H. Pshenychny Central State Academic Opera and Ballet Theatre of Ukraine; b) photographs from family albums and private collections of researchers. The latter, along with status archival visual documents, are extremely important because, firstly, they were formed in a natural way, in accordance with the subjects’ wishes of the shooting and its initiators, at first mainly by invited professional photographers in a

comfortable setting or in special photo salons, occasionally – these are amateur shots, over time the proportion of amateur shots gradually increased when photographic equipment and relevant equipment became available in families. Secondly, usually the photos from these collections are direct impressions of everyday life, with its various segments (usual and significant events in a person's life, their growing up, upbringing, education, acquiring a specialty and success in business, hobbies and interests, travels, rest and leisure, and often illnesses and death). An excursion into these video sequences allows us to trace family or corporate traditions, established ethical norms and values. On the one hand, they fully trace “the triad of everyday life” (housing – clothing – food), which makes it possible to reconstruct material existence, wealth and status, fluctuations in fashion, human tastes, etc., and on the other hand, involuntarily they reflect the formation of spiritual demands under conditions of a rapid transformation and new challenges for the intelligentsia, etc. Thirdly, because of this, these collections are fully correlated in their content with “rescue ethnography” as miniatures of the private and the general. Finally, it is worth emphasizing that these photographs were carefully preserved, and they were least subjected to artificial changes and deliberate retouching, their authenticity, and therefore reliability, they have sufficient grounds for use in the documentary reconstruction of everyday practices in combination with personal testimonies recorded in diaries, epistolary writings, memoirs, private notes, etc.

Under conditions of separation from the homeland, the need to keep photo chronicles of a family life not only remained, but also acquired fundamental importance, so as not to break intergenerational communication and not to lose national and civic identity. It was typical of every emigrant to take with him abroad, among the obligatory treasures, family albums with many photographs of several generations of his relatives and friends, taken in a wide variety of conditions. Over time, the content of reading these collections changed. At first, family photo cases remained private witnesses of individual destinies of people dear to descendants, their direct purpose was to continue family stories, to arouse faded memories among their loved ones. Over time, the documentary value of photographs from private collections grew, as they began to serve as pages not only of the family narrative, but also of the photo chronicle of history, especially during difficult tests periods of endurance.

The main mass of photographs officially available to the modern historian comes from the so-called Prague Archive, which after World War II was transferred to the Ukrainian SSR under the control of the Soviet special services. Its comprehensive, deep historical and source analysis was carried out by T. Boryak. The researcher focused on its photographic component, she traced that the photographs came to the archive in the form of framed albums. Initially, the “Prague” albums were not allocated separately, their numbering in the catalogue is not continuous. Therefore, they were analyzed with other documents (Boryak, 2011, p. 264). Photographic documents could have arrived in parts or been in storage for a certain time and processed later. Nowadays, the archival funds of Ukraine contain about 3.6 thousand units of photographic documents of Ukrainian emigration to the Czechoslovak Socialist Republic.

The photo-documentary segment of the Prague Archive was specially analyzed by N. Topishko, a head of H. Pshenychny Central State Film, Photo and Phono Archive Ukraine. As a result of several years of processing of materials received from Prague, she initially attributed 30 photo albums, but after a more thorough analysis she excluded four collections from their number. The chronological boundaries of these “Prague albums” are from the second half of the 19th century to 1938. 26 album collections contain 3,582 photo documents from the collections of the Museum of Liberation Struggle of Ukrainians

(Topishko, 1995, pp. 144–146). Among them are not only socio-anthropological photographs, but also other important handwritten and printed documents recorded on film that are of interest to document experts. Some albums, in addition to original photo documents, contain photocopies of drawings, engravings, etc. More than a third of the albums (10) provide video information about interned Ukrainians not only in Czechoslovakia, but also in other European countries. At one time, M. Mushynka mentioned 35 albums (4,087 photographs) from the life of Ukrainian prisoners of war in the camps, received from Prague in 1948 and 1958 (Mushynka, 2005, p. 114). These photographs elucidate the camp life of the internees. These are not only general panoramic shots of the camp barracks, production and utility rooms, and street arrangements. Many of them depict Easter celebrations, scenes from plays, choir performances, sports competitions, as well as organized relocations of residents to another camp, mass services, funerals, cemeteries, etc.

For example, a classic photo from the early 1920s shows members of a drama club in Nimetsky Yablunny, resting in national theatrical costumes on a picturesque meadow after a performance. Six young men are dressed in embroidered shirts, Cossack scrolls, girded with wide belts, and wearing boots. Four of them are wearing black or gray smoky hats, while the other two are holding their hats in their hands. Four girls – in embroidered shirts, fitted corsets, voluminous skirts with aprons, on their chests – several strings of various beads, their hair is combed in braids, ribbons on their heads, one of the girls has an elegant white cap on her head, delicately decorated with embroidery. Looking at this photo, you understand that for the participants of an amateur dramatic performance, performing scripted roles is an opportunity to truly immerse themselves in their native culture, to sing songs, dance, and tell witty jokes. Amateur actors pose for photos willingly, continuing the moment of imaginary return/immersion in their native folk culture.

We believe that the photos with bandura players (Photos 6, 7) are not at all ethnographic or wistful nostalgia for their native land.

They are seemingly different in terms of the fact of playing a folk instrument: one is about a concert performance by students from Poděbrady in May 1926, judging by the stage folk costumes and the signature on the back; the other is dated 1927 – 1929, it is an intimate and everyday scene, made in a non-parade corner of the front garden, it represents three men of different ages in suits and ties, each of them is identified (from left to right): a forest engineer M. Teliha, Professor of the Ukrainian State Academy of Music L. Hrabyna, a poet V. Kurylenko. It can be emphasized that in the first picture, M. Teliha (the third from the left) is recognizable. Therefore, a short dialogue between these pictures enables us to assert their essential similarity; in their language, they communicate about the preservation of national identity, about the connection of generations, about the synergy of loyalty to the idea of freedom and independence.

For the historian of everyday life in the interwar period, the personal funds of prominent Ukrainian figures who ended up in emigration are of a particular interest. In the Prague collection, these include, in particular, three private photo albums: two of the Ukrainian poetess O. Teliha from 1919 to 1934 (family photos, life of the Ukrainian community in Poděbrady, cities in Poland, students and teachers of the Ukrainian Academy of Sciences) and one of the sculptor O. Shevchukovykh (the 1930s). Secondly, these are albums of landscapes with photographs of cities and towns, villages and people present in the natural environment, although the majority of them are photos from before World War I, not from the 1920s and 1930s. Thirdly, two albums (591 photos) about the life of Ukrainian communities in cities and towns in France from 1924 to 1938, which reflect the life and everyday life of the Ukrainian community, the arrival of Ukrainian figures to these cities and towns, scenes from performances, etc. They are important for tracing the typicality and exclusivity of everyday conditions in various emigration settlements (Boryak, 2011, p. 266).

In our opinion, the content and meaning of “the Prague albums” enable us to speak of a “directorial” principle of their collection, scenarios and conditions for inclusion in the collection, developed by the custodians and employees of the Museum of Liberation Struggle of Ukrainians and the Ukrainian Historical Cabinet. The photographs, which are accumulated in them, were not taken arbitrarily, but specifically to consolidate in memory events and facts important for the common cause. At the same time, this fact does not diminish their importance in the study of everyday life, on the contrary – it enables us to select in a condensed form visual evidence of the most typical practices of a social everyday life of emigrants and, most importantly, the content of their lives in circumstances cut off from their homeland.

Photos from everyday life of Ukrainian emigrants should be used not only as a visual confirmation of the material situation and practical activities of the intelligentsia in exile, but also to read their visual text at the level of semantic meanings they contain.

The original methodology of social visualism using photographs was suggested by the Polish sociologist P. Sztompka (Sztompka, 2005). Among the sociological theories that may be used by visual sociology and at the same time may use photographic images heuristically or as evidence, there is A. Schutz’s phenomenological everydayness. In it, a person’s life world is determined by three determinants: situational circumstances, personal experience and a stock of knowledge – all this a person takes from society, from his individual collective, rethinking them individually and giving them his own, private interpretation. A person gives his own meaning to the materials of his life-world, received from the collective through constant contact with others. Although these materials always have their physical form, they still “must be things that can be seen, sounds that can be heard, or other phenomena accessible to a human sensory perception” (Schutz, 1970, p. 19), since their essence consists in the meaning they contain and in the way a person recognizes this meaning. Therefore, the world of a human life, on the one hand, is the world generated by society, and on the other, the world of meanings. And it is A. Schutz’s emphasis not only on the rational cognitive context of everyday life, but also on the mandatory consideration of its emotional and sensual fullness at the expense of a personal perception, memory, and interpretation. This is absolutely necessary for the establishment of everyday practices under extraordinary conditions, which is what emigration became for the Ukrainian intellectuals.

Having lost their usual everyday life due to forced emigration, people necessarily sought to preserve their former world through the memory of the learned and imprinted meanings. To maintain their memory, people use certain clues, carriers in which these vital meanings are contained and transmitted. A. Schutz includes notes, indicators, signs and symbols, which he interprets as follows: a) *notes* are private “subjective reminders” about something that will again be important in a person’s actions, temporarily interrupted; b) *indicators* are objects or phenomena, the presence of which is naturally connected with some other objects or phenomena, as a mandatory attribute, accessory; c) *signs* are objects or ways of behaving specifically designed to convey some other meaning, some message: “In order for signs to serve the purposes of communication, the one who transmits them and the one who receives them must understand them in the same way, respectively, use the same system of signs, remain within the same horizon of meanings. The most complex system of signs is language”; d) *symbols* are, according to A. Schutz, the second-level signs, metasigns or signs of signs, the sphere of a religious, magical, artistic, poetic, logical, and also scientific symbolism (Schutz, 1970, pp. 101, 103, 104).

Let’s try to trace this through available photographs. Thus, there is often such an elementary note of reminder as “a photograph in a photograph”, when the lens catches the second plan, behind the back of a portrait, photographs fixed on the wall or displayed in

frames on the desktop, often a group or individual, landscape or household with the image of objects abandoned in Ukraine, or often – a living room or porch of a house. In essence, these marks are traces of physical discontinuity, but certainly – also a spiritual inseparability.

We also see mental indicators of a kind in everyday objects – the decoration of professors' offices or stylization of kitchen utensils, where a glazed bowl, a mug, a ceramic toy, or even an Easter egg may catch the eye. Bookplates of personal collections of books also speak of the continuation of work begun in Greater Ukraine.

The photographs available to researchers of everyday life in emigration contain eloquent symbolic spokespersons. For example, in photographs of official meetings of societies, pedagogical meetings in a gymnasium, or academic councils in universities, one can often see a presidium table covered with a tablecloth with elements of national embroidery or a woven cloth with a solid pattern or bordered with a national ornament. The photoshoot recorded that embroidered towels are used to decorate the stage for ceremonial mass gatherings, a portrait of T. Shevchenko may be attached to the backdrop, and at party and political meetings, both a trident and a flag.

A. Schutz emphasized: "The world of my everyday life is by no means my private world, but an intersubjective world shared by other people, experienced and interpreted by others, a world common to all of us". For every person, the existence of others is a self-evident fact that is taken into account without hesitation: "Others are components of my situation, just as I am an element of their situation. A person directly sees and feels the bodies of others, their physical movements, the sounds they make" (Schutz, 1970, p. 31).

In the world of life, always filled with other people and their actions, interpersonal communication takes place, creating a domain of intersubjectivity over the individual goals or motivations of each partner. "Community is established through communications in which we address others as people addressing me, and both parties are aware of this" (Schutz, 1970, p. 165).

The ontological issues, as well as the methodological consequences of A. Schutz's sociology, according to the famous Polish sociologist P. Sztompka, open a wide field for the use of photography. Most of what is done in the world of everyday life is perceived by a viewer and is accessible for photographic registration maximally. Such registration is useful for fixing social situations and conducting a thorough analysis in the categories introduced by A. Schutz.

**Conclusions.** Based on the available photographs, one can draw conclusions not only about the material side of the daily life of emigrants, but also about their moods, experiences, emotions, trace the intentions and goals of their activities, analyze the degree of their social adaptation, the ability to accept challenges and the ability to communicate in new circumstances, establish cultural consumption, and clarify taste preferences. The objects of daily use in private space and during public and cultural events recorded in the photographs reveal the desire to preserve one's national identity and contribute to the restoration of the Ukrainian statehood.

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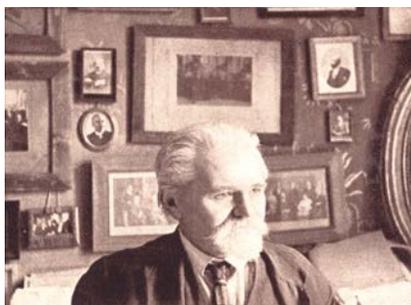


**Photo 1. Photo album page “Ukrainian Military Camps in the Towns of Liberec and Josefov”. 1918 – 1921. *Central State Audiovisual and Electronic Archive (Kyiv): A 98.***



**Photo 2. Professors, Associate Professors, Lecturers of the Ukrainian Free University in 1921 – 1922. From left to right: the 1st row (sitting) – S. Dnistriansky, I. Horbachevsky, O. Kolessa, S. Smal-Stotsky, F. Shcherbyna; the 2nd row – A. Artymovych, D. Antonovych, B. Matiushenko, M. Noskova-Bochkovska, M. Lozynsky, K. Losky, D. Doroshenko; the 3rd row – V. Starosolsky, V. Shcherbakivsky, S. Rudnytsky, R. Lashchenko, V. Tymoshenko.**

*Central State Archives of the Supreme Bodies of Power and Administration of Ukraine (Kyiv), f. 3859, d. 2, c. 53.*



**Photo 3. Dmytro Antonovych – rector of the Ukrainian Free University in 1928 – 1930, 1937 – 1938; a head of the Museum of Liberation Struggle of Ukraine in 1925 – 1934, 1935 – 1945.**

*Central State Archives of the Supreme Bodies of Power and Administration of Ukraine (Kyiv), f. 4018, d. 1, c. 8.*



**Photo 4.**

**Practice of students of the Ukrainian Economic Academy in a forest nursery  
State District Archive of Nymburk located in Lysa nad Labem.**

*Fund "Ukrainian Economic Academy in the Czechoslovak Socialist Republic located in Poděbrady", cardboard with temporary number 53. Digital photography, 2014.*



**Photo 5. The Narizhnyi family: Symon Petrovych, Iryna Lavrivna and Natalia. 1927.  
The village of Dobrzhikhovychi near Prague.**

*From the private collection of M. Mushynka.*



**Photo 6. Bandura students of the Ukrainian Academy of Economics in Poděbrady.  
May 17, 1926. Third from the left – M. Teliha.**

*Central State Archive of Public Associations of Ukraine (Kyiv), f. 269, d. 1, c. 481.*



**Photo 7. A group of Ukrainian emigrants in Poděbrady.**  
**From left to right: a forest engineer M. Teliha, Professor of the Ukrainian State Academy of Sciences L. Hrabina, a poet V. Kurylenko.**  
*Central State Audiovisual and Electronic Archive (Kyiv): 204616*

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**BETWEEN ART AND POLITICS: LVIV OPERA AND BALLET THEATRE  
UNDER THE CONDITIONS OF SOVIETIZATION IN 1939 – 1941**

**Abstract.** *The purpose of the research is to find out, on the basis of the archival and published materials, scientific works, the formation of Lviv Opera and Ballet Theatre under difficult conditions of the Bolshevik ideology forced imposition, the spread of denunciations, humiliations, arrests, repressions, deportations, terror in 1939 – 1941; to trace a real situation of actors, personnel, financial, ideological, material and technical and other support. The methodology of the research is based on the socio-cultural and biographical approaches, principles of historicism, scientificity, objectivity, systematicity with the use of general scientific (synthesis, analysis, generalization), special (historical comparative, historical typological, hermeneutic) and specific (systemic, prosopographic) methods. The scientific novelty is due to the introduction into the scientific circulation of the previously unknown archival documents, decrees and resolutions of state structures of the Ukrainian SSR, little-known works, memoirs and publications, which make it possible to trace the competitive struggle between theatre*

troupes of Galicia for theatre premises, to see a real situation and position of actors, management work, etc. **Conclusions.** The occupying Bolshevik authorities attached great importance to the cultural and artistic institutions activities in Western Ukraine in order to promote their political ideas. The former City Velyky Theatre had a leading role among them in Lviv, which was nationalized with all its property upon the Soviet power emergence. It was called Lviv State Opera and Ballet Theatre. The Ukrainians had great hope of having their own national theatre for the first time. However, very soon the theatre troupe recruited the Jewish, Polish, and several Ukrainian artists. The theatre troupe was also flooded with the Soviet actors, vocalists, choirmasters, ballet masters, choreographers, conductors, and other artists who came from different cities of the USSR. The theatre was headed by the Russian-speaking communist O. Holtsman, and Ya. Poliansky became the Head of the party organization. The theatre was staffed by NKVD employees, who meticulously “looked after” the personnel and their families, performances, controlled the ideological purity of the staff, etc. The logical continuation of the Soviet occupation was denunciations, arrests, massacres, and deportations. The theatre did not stage any Ukrainian national performance in the 1940 season, limiting itself to the Russian, Soviet and European classics. There was planned only one Ukrainian production for 1941 among the others, but the war and the German occupation became a new reference point and catalyst in the theatre’s activities.

**Key words:** Lviv Opera and Ballet Theatre, culture, art, performance, play, artists, repressions.

## МІЖ МИСТЕЦТВОМ І ПОЛІТИКОЮ: ЛЬВІВСЬКИЙ ТЕАТР ОПЕРИ І БАЛЕТУ В УМОВАХ РАДЯНІЗАЦІЇ 1939 – 1941 рр.

**Анотація.** *Мета дослідження* – на основі архівних і опублікованих матеріалів, наукових праць з’ясувати становлення Львівського театру опери і балету в складних умовах примусового насадження більшовицької ідеології, поширення доносів, приниженень, арештів, репресій, депортацій, терору 1939 – 1941 рр.; простежити реальне становище акторів, кадрове, фінансове, ідеологічне, матеріально-технічне та інші забезпечення. **Методологія дослідження** побудована на соціокультурному та біографічному підходах, принципах історизму, науковості, об’єктивності, системності із застосуванням загальнонаукових (синтез, аналіз, узагальнення), спеціальних (історико-порівняльний, історико-типологічний, герменевтичний) іспецифічних (системний, просопографічний) методів. **Наукова новизна** зумовлена введенням до наукового обігу досі невідомих архівних документів, указів й постанов державних структур УРСР, маловідомих праць, спогадів та публікацій, що дають змогу простежити конкурентну боротьбу між театральними труппами Галичини за приміщення театру, побачити реальне становище і позицію акторів, роботу дирекції тощо. **Висновки.** Окупаційна більшовицька влада для пропаганди своїх політичних ідей великого значення надавала діяльності закладів культури і мистецтва Західної України. Серед них, у Львові, провідне місце належало колишньому міському Великому театру, який з приходом радянської влади було націоналізовано з усім майном. Тоді він отримав назву Львівський державний театр опери і балету. Вперше за багаті вік в українців появилася велика надія своїй національній театру. Проте дуже скоро до складу театральної труппи набрали єврейських, польських та декілька українських артистів. Штатний склад театру також поповнили прибулі з різних міст СРСР радянські актори, вокалісти, хормейстери, балетмейстери, хореографи, дирекенти та інші фахівці високого мистецтва. Очолив театр російськомовний комуніст О. Гольцман, а Я. Полянський став керівником партійної організації. До театру були прикріплені штатні співробітники НКВС, які прискількиво “опікувалися” кадрами та їхніми родинами, постановками, контролювали ідейну чистоту колективу тощо. Логічним продовженням радянської окупації стали доноси, арешти, розправи, депортації. Жодної української національної вистави у сезоні 1940 року театр не поставив, обмежившись російською, радянською та європейською класикою. Серед інших лише одну українську постановку запланували на 1941 рік, але війна і німецька окупація стали новим орієнтиром й катализатором в діяльності театру.

**Ключові слова:** Львівський театр опери та балету, культура, мистецтво, перформенс, вистава, артисти, репресії.

**Problem Statement.** In September 1939 the Soviet occupation of the Western Ukrainian lands changed the situation of the region’s population radically. However, despite the

attractive national, social, economic, cultural, educational and other slogans of the “Soviet liberators”, there were many hidden sides on the path to the new government establishment. There were common denunciations, searches, arrests, torture, murders, deportations of the local population against the background of propaganda of “great” socio-economic, socio-political, cultural and other “transformations”. There are well known atrocities and tragic consequences of the repressive actions from archival sources, excavations of places of mass massacres, memoirs of contemporaries, etc. Domestic and foreign historians devoted their works to the above-mentioned issue (Rudnytska, 1958; Bilas, 1994, pp. 108–156; Ilnytskyi, 2018, pp. 120–150; Bilorusets, 2022; Bulyk, 2024, pp. 13–32).

However, many important issues remain beyond the scholars’ focus. One of them is the issue on the formation and activity of cultural and artistic centres in the Western Ukrainian lands under the conditions of denunciations, arrests, repressions, and forced imposition of the Bolshevik culture and ideology. At the end of 1939 the leading artistic centre of Western Ukraine was Lviv State Opera and Ballet Theatre. However, its personnel and creative activities were under a strict control of the administrative, communist party, komsomol, trade union bodies, and NKVD security forces, which complicated the work of the collective and determined its main priorities.

**Review of Recent Research and Publications.** It should be noted that the work written by O. Bonkovska stands out for its relevance among the most recent publications, in which there was made an attempt to classify theatres in the Western Ukrainian lands during the interwar period (Bonkovska, 2008). I. Zuliak conducted an interesting research, which was devoted to the theatrical activity of the “Prosvita” circles (Zulyak, 2009, pp. 98–105). There was a considerable focus on the theatrical activity of the Ukrainian cultural institutions during World War II by S. Maksymenko (Maksymenko, 2015), V. Ilnytskyi and M. Haliv (Ilnytskyi, & Haliv, 2023). R. Berest, O. Plahotniuk, O. Petryk, O. Kuzyk devoted their studies on the work of the talented representatives of Lviv ballet art (Berest, Petryk, & Kuzyk, 2022, pp. 104–114; Berest, & Plahotniuk, 2024, pp. 8–18) and the others.

The source base of the study consists of the documents taken from Fund R.-2133 (Lviv State Opera and Ballet Theatre) and individual files from Fund 1 (the “Prosvita” Society) of the State Archives of Lviv region, which enabled us to trace the process of the staff formation, cultural and educational, economic, ideological and political, and other activities of the theatre.

**The purpose of the research** is to highlight the basic principles of the formation of a creative troupe, characteristic features of the theatrical activity and a real situation of Lviv Opera and Ballet Theatre artists during the Soviet occupation of Western Ukrainian lands in 1939 – 1941.

**Research Results.** The Grand City Theatre was considered to be one of the most presentable, significant and majestic cultural institutions of interwar Lviv<sup>1</sup>. It was Zygmunt Gorgolewski, the architect, who designed the Grand City Theatre, which was built at the turn of the 19th – 20th centuries during the Austro-Hungarian rule<sup>2</sup>. The theatre building was decorated generously with rich modern decor, symbolic sculptural compositions, bas-relief

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<sup>1</sup> Opened in 1900 as the Lviv Grand City Theatre. On December 19, 1939, under the Soviet occupation, it was renamed the Lviv State Opera and Ballet Theatre (nowadays the Solomiya Krushelnytska Lviv National Academic Opera and Ballet Theatre).

<sup>2</sup> Zygmunt Gorgolewski (1845 – 1903) was a famous Polish architect, the author of a number of architectural projects, builder and restorer of many buildings in Hanover, Berlin, Kiel, Bonn, Halle, Opole, Poznań, Olsztyn, Lviv and other European cities.

stucco, which was an expression of significant creative achievements in the fields of design, construction, architecture, sculpture, stonework, and painting, etc. (Hrankin, & Sobolevsky, 2001, pp. 37–47).

The Grand City Theatre not only became one of the most elegant and prominent buildings, but also an architectural decoration of Lviv. It was a prominent place of creation and public representation, primarily of the high Polish culture from the time of its construction and during the interwar period. The Ukrainian culture was in a quandary at that time, which was determined by the limited scope of activities of small travelling theatres, in particular, Ivan Tobilevych theatre troupes (Ukrayinsky narodny, 2000, pp. 3432–3433), “Zahrava” (Ukrayinsky molody, 2000, p. 3429), I. Kohutiak Ukrainian Mobile Drama Theatre (Ukrayinsky rukhomy, 2000, p. 3437), the “Prosvita” amateur collectives (Derzhavnyi arkhiv Lvivs’koi oblasti [State Archives of Lviv Region – SALR], f. 1, d. 53, c. 10297, pp. 5–6), the first Ukrainian professional theatre “Ukrainian Besida” (Ukrayinska besida, 2000, p. 3340), individual workers societies (Pasitska, 2013, pp. 19, 30–35), the Ukrainian trade unions (Berest, 1995, pp. 50–57; Berest, I., Berest, R., Pasichnyk, M., Pasichnyk, S., Savchuk, Strelbytska, 2021, pp. 197–204) and the other organisations.

In a short article, the periodical “Chervona Ukraina” Ivan Kudla, Lviv artist, covered a real situation of the Ukrainian theatres under the Polish rule on October 9, 1939: “There merged two Ukrainian theatres Tobilevych Theatre and “Zahrava” Theatre last year, one collective was created – Kotliarevsky Theatre. It was located in Lviv, but we had to perform only 3–4 times during the year, and even then in the premises of the “Rozmaitosti” theater or in the Jewish theater. It was impossible to get to the city theatre. The troupe travelled around towns and villages, living under poor conditions and in hunger. The voivodeship, starosta and police censorship doublechecked the repertoire. Everything that even slightly resembled the folk, the Ukrainian, was crossed out mercilessly. The Polish adhered to its policy government consistently and stubbornly in persecuting the Ukrainian theatre, which was aimed at destroying the Ukrainian culture” (Kudla, 1939).

The Greek Catholic Church and its leaders provided the greatest support to the national culture, while there were tense and difficult conditions of the Ukrainian-Polish relations in the interwar Galicia. However, during the pre-war period, when the population of Galicia was under the Austro-Hungarian rule, the Poles’ attitude towards the Ukrainians was more balanced and tolerant in the field of culture and education, despite irregularities. It should be noted that even the patrons of the Ukrainian cultural institutions were the Polish Prince J. Czartoryski (Pasitska, 2013, p. 19), Count T. Diduszytski (Bulyk, & Berest, 2023, pp. 81–89), and others.

The Ukrainian culture occupied declaratively a dominant position in the artistic landscape of the region’s social life for the first time when there emerged the Bolshevik power in the Western Ukrainian lands at the end of September 1939. However, the Soviet occupation administration provided “support” of the Ukrainian national culture, first of all, as an integral part of the general policy of the forced assimilation of the Galicians in line with the Bolshevik ideology. The Soviet authorities sought to accelerate incorporation of the occupied territories into the Soviet political system, hence, tried to guise Ukrainization of the Western Ukrainian lands.

The history of the creation of Lviv State Opera and Ballet Theatre, which in Lviv was associated with the building of the Grand City Opera and Ballet Theatre, turned out to be quite complicated (Petryk, 2020, pp. 104–113). Hence, there merged two theatres: I. Kotliarevsky Ukrainian Theatre, headed by Volodymyr Blavatsky, and the “Artistic Tour” Theatre, headed

by Yosyp Stadnyk at the beginning of October 1939. As a result, there was announced the creation of T. Shevchenko State Ukrainian Theatre of Lviv, headed by V. Blavatsky, and Yo. Stadnyk became his deputy. The established theatre began to share the premises of the Grand City Theatre with the Polish Drama Theatre. “We already have the newly established Taras Shevchenko State Ukrainian Theatre of Lviv. It is located in the Polish city theatre, where we, the Ukrainian artists, were previously forbidden to enter” (Kudla, 1939).

In the periodical of the Lviv Regional Committee of the party “Vil’na Ukrayina” (“Free Ukraine”) it was reported that “the first T. Shevchenko Ukrainian Theatre in Lviv is preparing two plays for October holidays ... Two comrades Stadnyk and Blavatsky were in charge of the preparations” (Teatr do zhovtnya, 1939). There was stated another note in the above-mentioned periodical that “... the trade union of trade workers is actively preparing for the 22nd anniversary of the Great October Socialist Revolution. The girls Relia Gottlieb and Telia Buchdorf are working on decorating the hall, where the gala evening will be held. The young artists: Otto Lenz and Leon Kontorski painted portraits of comrades Stalin and Voroshylov. Lviv artists, who made a new map of Europe are helping to decorate the hall. An artistic montage has also been made, reflecting the collapse of gentry Poland. The singing group is studying the songs written by the Soviet composers” (U profspiltsi torhovelnykh pratsivnykiv, 1939).

There was issued the Resolution of the Council of People’s Commissars of the Ukrainian SSR on the establishment of state theatres in Lviv and the organization of their work on December 19, 1939. The first point of the Resolution was the task of organizing the “State Ukrainian Opera and Ballet Theatre” in Lviv, providing it with the premises of the former Grand (Velyky) City Theatre. The State Ukrainian Drama Theatre was temporarily offered the premises of the “Narodny Dim” (People’s House) and the “Rozmaitosti” Theatre, and the former Polish Theatre was offered the premises of the “Novynny” Theatre in Lviv (Halaychak, & Lutsky, 1995, p. 68).

However, V. Blavatsky, the director of the drama theatre did not give up hope for the prospect of establishing his troupe in the premises of the Grand (Velyky) City Theatre, emphasizing the ideological support of the Soviet authorities. On January 8, 1940 there was issued Decree of the Presidium of the Supreme Soviet of the Ukrainian SSR with the wording “to satisfy” the petition of the employees of the Ukrainian State Drama Theatre and public organizations of the city of Lviv and to name the theatre – Lesia Ukrainka Theatre (Ukaz, 8.1.1940), which received a resonance in the collective, because no one from the collective had applied to the authorities with such a petition.

On February 4, 1940, in an interview with a correspondent of the periodical “Vilna Ukrayina” V. Blavatsky noted that “four months have passed since I. Kotliarevsky Ukrainian Theatre and Yo. Stadnyk Theatre were united into a single creative team. The newlyformed theatre received beautiful premises of Lviv Grand (Velyky) Theatre. The first plays were the works by the Ukrainian classical authors – “Khmara” (“The Cloud”) by A. Sukhodolskyi and “Zaporozhets beyond the Danube” by P. Artemovskiyi. The active team is proud that it is the first theatre in the western regions of Ukraine, where the Soviet play is first staged. We worked enthusiastically on the play “Plato Krechet” by the Ukrainian Soviet playwright, medalist Oleksandr Korniyuchuk (Chotyry misyatsi roboty, 1940).

A typical example of a werewolf was the active pro-Soviet activities of the Deputy Director, Yosyp Stadnyk, who was also one of the first to start forming a new Soviet theatre in Lviv. In 1940, he was even elected a Deputy of the Supreme Soviet of the Ukrainian SSR. Against a general background of his position and activities in various political systems, it is

difficult to unambiguously evaluate Stadnyk's real attitude towards the Soviet government. It seems that his flattering support for the Communist regime was primarily due to career ambitions (Kandydat, 1940).

The fact remains controversial that the process of the real formation and rise of the Ukrainian theatre was the result of interaction and cooperation of numerous artists with the Soviet occupation regime. There were persecutions, arrests and murders of the nationally minded Ukrainians, the Poles, the Jews, mass deportations, including the Polish population, the German colonists, and a powerful influx of the pro-Soviet elements, primarily Russian-speaking, into the Western Ukrainian lands, at the same time the Ukrainian artists celebrated the triumph of the first national plays in the history of the Grand (Velyky) Theatre in Lviv. In fact, there was formed a new moral liminality under the influence of the Bolshevik ideology, which was accompanied by forceful measures in the social environment.

The building of the Grand (Velyky) City Theatre in Lviv became the central venue for diverse political performances, which was decorated with the portraits of the Bolshevik leaders, red flags, communist slogans and other ideological rubbish. In fact, there was formed a new theatre within the walls of the Grand (Velyky) City Theatre in Lviv from the end of 1939, on the basis of the Resolution of the RNK of the Ukrainian SSR. The above-mentioned theatre was named Lviv State Opera and Ballet Theatre and subordinated to the Ministry of Culture of Ukraine in December 1939. At the same time, the administrative management of the institution was reorganized, subordination, staff, orchestra, choir, ballet troupe, workshops, sweatshops, an inventory of property, etc., was carried out. There were sent about 20 qualified, mostly Russian-speaking artists, choreographers, ballet masters, etc., to work in the theatre from Kyiv, Kharkiv, Odesa and other cities during the organizational period.

O. M. Holtsman, a member of the All-Union Communist Party (the Bolsheviks) was appointed as the Director of the Ministry of Culture Theatre, and M. Yo. Pekeran became the Chief Accountant. In the theatre there was established the komsomol and party organization. Ya. Ya. Poliatsky was appointed the party leader by Lviv Regional Committee of the Communist Party. There were several leading figures, who became the active propagandists of the Soviet region, for example, the Chairman of the MK M. S. Priplis, the Chief Conductor M. D. Pokrovskiy, the Chief Director Prof. O. I. Ulukhanov, the Choreographer Ye. D. Vihiliiev, the Vocalists O. P. Poliakov, F. M. Slonevska, V. I. Gilzenrad, the Ballet Soloist N. H. Prostakivna, the Concertmaster of the orchestra D. B. Shtriks, and the others. The new theatre administration emphasized that all cultural events and especially the election campaign in the western regions of Ukraine would provide an opportunity to show the whole world the "steel" unity of the Ukrainians (Velyka, radisna podiia, 1940).

The Bolshevik government tried to recruit not only the most famous and authoritative figures in science, education, medicine, industry, church, but also culture and arts from the first days of its establishment. Numerous Galicians became the deceived victims of the Communist regime. In particular, this happened during the organization and holding of the so-called People's Assembly of Western Ukraine in the city theatre on October 26–28, 1939, at which the communist government, through the mouths of delegates, tried to legitimize the occupation and present the act of annexation as the "reunification" of the Western Ukrainian lands with Soviet Ukraine (Şchurchalo, 2019).

There were some artists (Filypchak, Zulia de Bonze, Turska-Bandrovskia, etc.), who did not arrive at Lviv even after they received the financial support and guidance for work by the Ministry of Culture of Ukraine (SALR, f. R.-2133, d. 1, c. 2, p. 27).

Lviv State Opera and Ballet Theatre inherited three buildings from the former Grand (Velyky) Theatre. The main building was located in the central part of the city at 1 Holukhovskiy Square (nowadays 28 Svobody Avenue). There was a building for storing scenery in the suburbs of Lviv (in Klepariv), and there were production workshops at 6 Soniachna Street (nowadays P. Kulisha Street), which at the end of 1939 were reorganized into tailoring, decoration, carpentry, furniture and props and hairdressing workshops (SALR, f. R.-2133, d. 1, c. 2, p. 30).

From the former Polish theatre there were also inherited many things: a large music library, numbering 37 thousand 724 volumes, a huge wardrobe of men's and women's costumes (about 20 thousand sets), over 500 pairs of men's and women's shoes, 9 pianos, an organ, a stage curtain with technical mechanisms, a Siemiradsky curtain, electrical equipment, a gas station and many other properties by Lviv State Opera and Ballet Theatre, which the theatre's Inventory Commission, consisting of the Chairman Poliansky Ya. Ya., members Pekerman M. Y. and Grinshtein S. N., estimated at 2 million 553 thousand 992 rubl. 92 kop. (SALR, f. R.-2133, d. 1, c. 2, p. 12).

In 1940 the theatre management put premium on the decoration and repair of the premises (67,700 rubliv), as well as on the purchase of various goods despite the received, rich inheritance. There could be found various equipment and devices (1,900 rubliv), musical instruments (36,200 rubliv), a Fiat car (8,300 rubliv), a sculpture of Lenin (1,500 rubliv), carpets, furniture, among those purchased things etc., which amounted to a total of 70,600 rubliv (SALR, f. R.-2133, d. 1, c. 2, pp. 10–11).

Lviv Opera and Ballet Theatre began its work on January 15, 1940. Its annual creative activity can be divided into preparatory and production. According to the plan, the preparatory period was to last from January 15 to September 1, 1940. However, it ended only on September 21 of the same year and amounted to 248 days. There were diverse reasons for the delay, as indicated in the report, financial, material and technical, ideological and organizational difficulties, as well as tours in their premises of Kyiv Opera and Ballet Theatre, Kyiv Theatre of the Young Spectator, I. Franko Kyiv Theatre. Hence, the production period lasted for only 102 days, which was to be 122 days (SALR, f. R.-2133, d. 1, c. 2, p. 35).

The official payment for the theatre staff provided for a monthly differentiated payment of an advance (prepayment) and the salary balance. The management began to practise taking away part of the earned money, and the director's fund was formed from the first prepayments. In particular, it was stated in the advance statement for January 1941 that O. M. Holtsman, the Theatre Director (765 rubliv 50 kop.) received the highest advance payment, from which only 50 rubliv were taken away, and the lowest (10 rubliv) – by a young ballerina N. Ya. Koliada, from which the entire amount was taken away to form the fund. At the same time, the advance payment of the talented prima ballerina of the theatre Valentyna Pereyaslavets (Berest, Petryk, & Kuzyk, 2023, pp.104–114) was 661 rubliv, but there were taken away 400 rubliv (SALR, f. R.-2133, d. 1, c. 2, p. 23). Everything (delay and non-payment of part of the earned money) turned into a massive financial abuse by the administration and subsequently became a certain norm in the theatre management activities (SALR, f. R.-2133, d. 1, c. 2, p. 22).

In total, there were taken away 4,960 rubliv, from the advance payment of 7,801 rubliv for January 1941, which was accrued as an advance payment for 49 people of the theatre, (SALR, f. R.-2133, d. 1, c. 2, p. 30), which in its turn indicated the abuse of power, the establishment and development of a corrupt system in the institution. The theatre artists became hostages involuntarily without any rights in the above-mentioned situation. There

are no complaints or information about the dissatisfied individuals among the materials of the theatre's archival files. Due to a strict public control, hidden arrests and reprisals there were constrained not only the artists, but the entire surrounding society (Vasylchuk, & Drozdov, 2023, pp. 170–186).

It should be mentioned that the theatre employees reacted differently to the criminal actions of the Communist regime. There were mass arrests and the Galicians deportations to the east in the spring of 1940. The theatre was surrounded by a network of secret NKVD employees and the “party comrades”, who made the reports and denunciations at the first opportunity. A number of artists expressed their support for the new authorities, but the vast majority of actors tried to abstain from the public statements, as there was fear of distortions, denunciations, and arrest. The management collaborated actually with regular NKVD employees, who were attached to the theatre and kept a watchful eye on the personnel, studying their biographical data, family, political sympathies, preferences, connections, and work meticulously. In particular, there was one case regarding the discrepancy of accrued salary, the amount of 150 rubliv, by A. S. Kopchynskyi, which was considered by the court. V. M. Holubchik was also on trial, who had a debt to the theatre's cash desk for purchased fuel in the amount of 271 rubliv 90 kop. (SALR, f. R.-2133, d. 1, c. 2, p. 25). At that time, the theatre paid the NKVD employees 10 thousand 30 rubliv for the work performed in 1940, and also allocated 384 rubliv for the operational work (SALR, f. R.-2133, d. 1, c. 2, pp. 19–20).

There was founded the Institute for Advanced Training at the theatre at the beginning of 1940. The purpose of its activities was to establish ideological and political work and practical training for the theatre employees. There were conducted lectures on the history of the party, the Stalinist constitution, the international situation, etc., to the course participants. Given the multinational composition of the troupe, which included the Poles, the Jews and the Russians, there was a certain focus on the need to master the Ukrainian language, especially among the vocalists. Professors Ulukhanov, Liubynetsky, Olevska and Hartopan worked with the vocals at that time. There were also held practical classes in acting, make-up and flexibility. The ballet troupe was differentiated into three groups based on the practical experience gained (SALR, f. R.-2133, d. 1, c. 2, pp. 34–35). It seems that the members of the junior ballet group, which included young and talented ballerina Roma Pryima, were not given any cash dividends (Berest, & Plahjtniuk, 2024, pp. 8–18).

In general, the theatre was in a difficult financial situation in 1940. Its financial activities were based on the bank loans. The actual amount of funds from the main activity amounted to 2 million 697 thousand 652 rubliv 61 kop instead of the planned 2 million 622 thousand 500 rubliv for 1940. Of these, losses amounted up to 75 152 rubliv 61 kop. The main reason for the financial difficulties was the lack of working capital for the production of plays, the shortage of funds for the income part, which was associated with the delay and reduction of the season by 20 days, unforeseen expenses for electricity, payment to the artists for rented housing, business trips, celebrations, additional payments, etc. (SALR, f. R.-2133, d.1, c. 2, p. 39).

According to the archival documents, the city authorities were unable to provide the arriving artists with housing, and, hence, many people stayed at hotels and private apartments in the city. The theatre paid 72 200 rubliv for the artists' accommodation from the received credit funds at the end of 1940. There were large expenses for the electricity used (95 700 rubliv). The debt for the salaries, deductions and taxes amounted to 96 700 rubliv (SALR, f. R.-2133, d. 1, c. 2, p. 36).

The expenses on paying the NKVD employees became a new element in the theatre's expense items (SALR, f. R.-2133, d. 1, c. 2, p. 20). At the beginning of January 1941, the theatre's outstanding accounts payable amounted to 169 500 rubliv (SALR, f. R.-2133, d. 1, c. 2, p. 36). On the initiative of the administration, the number of seats in the auditorium was increased from 1050 to 1162. This made it possible to increase the occupancy rate of the theatre hall for the morning performances from 85% to 111%, and for the evening performances – with a noticeable decrease in profit (SALR, f. R.-2133, d.1. c. 2, p. 35).

The clear pro-Soviet sentiments of the institution's management proved problematic for the practical implementation of the Ukrainian plays. It was noticeable in the first repertoire. Hence, the first own production of the Lviv Opera and Ballet Theatre was to be the opera by M. Lysenko "Taras Bulba" based on the novel under the same name written by M. Hohol. But a month before the season started, the opera director N. Smoliuch had announced the impossibility of staging the above-mentioned play (SALR, f. R.-2133, d. 1, c. 2, p. 33).

There was an urgent replacement in the repertoire: the tried-and-tested Soviet opera "Tyhyi Don", prepared and staged, based on the novel under the same name by M. Sholokhov and staged by Leningrad composer I. Dzerzhynskyi. It should be mentioned that due to the nationalized property of the Grand (Velyky) Theatre, there were used for the production of "Tyhyi Don" material assets worth 6 131 rubliv 82 kop., which reduced the costs of staging the play significantly. I. Dzerzhynskyi arrived at Lviv from Leningrad and took care of the performance preparation. He was present at its premiere on September 21, 1940 (SALR, f. R.-2133, d. 1, c. 2, p. 33).

In total, there were included seven performances in the repertoire of Lviv Opera and Ballet Theatre in 1940. After "Tyhyi Don", there were staged the operas "Tryviata" (24. X), "Aida" (25.IX), "Yevheniy Oniehin" (29.IX) and the ballets "Don Quixote" (24.IX), "Madame Butterfly" (5.XI) and "La Bohème" (18.XII) (SALR, f. R.-2133, d. 1, c. 2, p. 32). As we see, there wasn't staged any Ukrainian performance in the theatre in 1940. The first season presented the works of the Russian, Soviet and foreign classics.

There was provided a significant material and technical assistance by nationalized funds (117,731 rubliv 20 kop) in order to stage the above-mentioned performances (SALR, f. R.-2133, d. 1, c. 2, p. 30), which, in our opinion, should have reduced the costs of purchasing and improved the financial situation of the theatre.

The administration of Lviv Opera and Ballet Theatre began to form the repertoire for 1941 at the the end of 1940. The opening of the season was planned on February 5, 1941, with Reinhold Gliere's ballet "The Red Poppy" staged by Yevheniy Vihiliiov. There were considered for the staging the operas "Taras Bulba" (M. Lysenko), "Carmen" (J. Bizet), "Halka" (S. Moniushko), "Duma pro Opanasa" (V. Yurovsky), the operetta "The Gypsy Baron" (J. Strauss), the ballet "Prince Ihor" (A. Borodin), "Snihurochka" (P. Tchaikovskyi), "Lileya" (K. Dankevych), etc. (SALR, f. R.-2133, d. 1, c. 2, p. 30).

But the war and the German occupation changed the situation and plans of the theatre. The majority of the Russian-speaking artists and party leadership fled to the east, seeking salvation in the camp of Bolshevism (SALR, f. R.-2133, d. 1, c. 2, p. 30).

**Conclusion.** Hence, the widely publicized liberation of Western Ukraine from the Polish oppression and reunification with the Soviet Ukraine in September 1939 became a cover for the annexation of Western Ukrainian lands and the total Sovietization of the local population. Lviv Opera and Ballet Theatre took a leading place in the ideological and political consolidation of the Bolshevik government. Its management and personnel were renewed substantially due to the arrival of the Russian-speaking and pro-Soviet Ukrainian

artists in Lviv from various cities of the Soviet Union. At the theatre there was established a strict control not only over the activities and behaviour of employees, but also over their families, acquaintances, etc.

There were organized diverse training courses, lectures, circles, trade union, komsomol and party schools at the theatre in order to accelerate the introduction of the Bolshevik ideology. However, against the general background of widely promoted freedoms, abundance and prosperity, the denunciations, humiliations, arrests, murders, deportations, Russification, robberies and nationalization, the closure of museums, societies and, especially, the reformatting of national cultural values into a new ideological direction became a bitter daily existence. There dominated the Soviet, Russian and foreign classics in the theatre's repertoire, and the artists involuntarily became obedient and effective tools on the path to implementing the plans of the Bolshevik government.

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**THE ROLE OF REFUGEES FROM COMMUNISM  
IN U.S. COLD WAR POLICY: INFORMATION, INTELLIGENCE,  
AND MILITARY DIMENSIONS (1947 – 1952)**

**Abstract.** *The purpose of the research* consists in exploring how refugees from communist regimes came to play a role in the U.S. information, intelligence, and military policy during the early stages of the Cold War (1947 – 1952). The study aims at revealing the mechanisms and motives behind the American instrumentalization of displaced people from Eastern Europe in the context of strategic confrontation with the Soviet Union. **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, and problem-chronological methods. **The scientific novelty** consists in a comprehensive reinterpretation of the Cold War refugee policy as a multidimensional instrument of the U.S. foreign strategy. It identifies three key functions performed by refugee communities: intelligence resource, propaganda amplifier, and potential military asset. The study reconstructs the formation of refugee-based media institutions such as Voice of America, Radio Free Europe, and Radio Liberty, analyzes the emergence of émigré military units, and evaluates Truman-era legislation such as the Mutual Security Act and the United States Escapee Program (USEP). Particular focus is on anti-Soviet political mobilization among ethnic minorities and their role in shaping the U.S. narratives on the global stage. **Conclusions.** The Cold War converted displaced people into strategic leverage within U.S. policy, shaping how the West responded to Soviet expansionism. Refugees became not merely recipients of humanitarian aid but active agents in intelligence gathering, psychological operations, and public diplomacy. U.S. governmental institutions, in cooperation with émigré organizations, systematically utilized refugees' background knowledge, ideological stance, and transnational networks to construct a counter-narrative to communist propaganda. The long-term consequences of these practices included the institutionalization of refugee participation in Western security and media architectures, the moral justification of U.S. containment policies, and the consolidation of ideological fault lines within divided Europe. By documenting this transformation, the article contributes to a more nuanced understanding of early Cold War politics and the intersection of migration, security, and ideology in U.S. global engagement.

**Key words:** refugees from communism, Cold War, United States foreign policy, Voice of America, intelligence operations, displaced persons, anti-Soviet propaganda.

## РОЛЬ БІЖЕНЦІВ ВІД КОМУНІЗМУ В ПОЛІТИЦІ США ЧАСІВ ХОЛОДНОЇ ВІЙНИ: ІНФОРМАЦІЙНИЙ, РОЗВІДУВАЛЬНИЙ ТА ВІЙСЬКОВИЙ ВИМІРИ (1947 – 1952)

**Анотація. Мета дослідження.** У статті досліджено, яку роль відігравали “біженці від комунізму” у реалізації інформаційної, розвідувальної та військової політики США на ранньому етапі холодної війни (1947 – 1952 рр.). Метою роботи є виявлення механізмів і мотивів американської політики використання переміщених осіб зі Східної Європи в контексті стратегічного протистояння із Радянським Союзом. **Методологія дослідження.** Методологічну основу становлять принципи конкретно-історичного підходу – історизм, об’єктивність, комплексність, цілісність і системність, а також методи аналізу й синтезу, історико-порівняльний і проблемно-хронологічний підходи.

**Наукова новизна.** У дослідженні запропоновано комплексну інтерпретацію політики США щодо біженців у період холодної війни як багатовимірного інструменту зовнішньополітичної стратегії. Виокремлено три ключові функції, які виконували емігрантські групи: джерело розвідувальної інформації, підсилювач пропаганди та потенційний військовий ресурс. У статті реконструйовано процес створення медіаінституцій, що базувалися на участі біженців, зокрема “Голос Америки” (Voice of America), “Радіо Вільна Європа” (Radio Free Europe) та “Радіо Свобода” (Radio Liberty), проаналізовано виникнення емігрантських військових підрозділів, а також розглянуто законодавчі ініціативи адміністрації Трумена, зокрема Закон про взаємну безпеку та Програму допомоги втікачам (USEP). Особливу увагу приділено антирадянській політичній мобілізації національних меншин і її впливу на формування американських нарративів у глобальному дискурсі.

**Висновки.** Холодна війна перетворила переміщених осіб на інструмент стратегічного впливу в американській політиці, визначаючи реакцію Заходу на радянську експансію. Біженці виступали не лише як об’єкти гуманітарної допомоги, але і як активні учасники розвідувальної діяльності, психологічних операцій та публічної дипломатії. Американські урядові структури у співпраці з емігрантськими організаціями системно залучали біженців, використовуючи їхню обізнаність, ідеологічну налаштованість та транснаціональні зв’язки для конструювання контрнарративу проти комуністичної пропаганди. Довгостроковими наслідками цього процесу стали інституціоналізація участі біженців у безпековій і медійній архітектурі Заходу, моральне виправдання політики стримування СРСР та формування стійких ідеологічних розломів у післявоєнній Європі. З’ясування цих факторів, уможливило глибше зрозуміти ранній етап холодної війни, зокрема, в перетині міграції, безпеки та ідеології у глобальній політиці США.

**Ключові слова:** біженці від комунізму, холодна війна, зовнішня політика США, Голос Америки, розвідувальні операції, переміщені особи, антирадянська пропаганда.

**Problem Statement.** The early stages of the Cold War coincided with the transformation of refugees from Eastern Europe into valuable political, ideological, and strategic assets for the United States. As communist regimes consolidated across the region, thousands of displaced people – often with experience in military, academic, or governmental fields – found themselves in the American zone of postwar Europe. This population, initially received as a humanitarian burden, quickly assumed a new role within the emerging U.S. strategy of containment. Yet, in much of the historiography, the role of these refugees as active participants in intelligence operations, psychological warfare, and military planning has received a limited systematic research focus. The problem consists in the insufficient scholarly focus on how émigrés were not merely resettled but purposefully mobilized by American institutions as instruments in the confrontation with the Soviet bloc.

**Review of Recent Research and Publications.** In recent studies there has been done the analysis of the U.S. refugee policy during the early Cold War through the lens of ideological conflict, strategic planning, and public diplomacy. Carafano (1999) did the

research on American efforts to integrate stateless Europeans into military units, highlighting the securitization of refugee flows. Bethell (2016), Cull (2008), and Zawodny (1986) analyzed the role of émigré broadcasters in the development of Radio Free Europe and other instruments of psychological warfare. Kodin (2003, 2013) and Dubnitskii (2014), using data from the Harvard Refugee Interview Project, elucidated how refugee testimony contributed to U.S. Sovietology and intelligence analysis.

Recent historiographical studies by Ballinger (2025), Banerjee and Lingen (2025), and Nilsson (2023, 2024) reassess the role of refugees in the Cold War as political actors embedded in systems of surveillance, propaganda, and postwar reconstruction. These studies emphasize the agency of displaced people and their participation in shaping Western responses to the Soviet expansionism. A broader theoretical grounding for these perspectives is provided by Zolberg, Suhrke, and Aguayo (1989).

This article also draws on earlier studies by Yushkevych (2024, 2025), which analyzed U.S. responses to the Soviet repatriation missions and illegal Jewish migration from Poland. These works contribute a diplomatic and institutional context to the present study and serve as a conceptual foundation for understanding the operational role of refugees in the American Cold War strategy.

**The purpose of the research** consists in exploring how refugees from communist regimes came to play a role in the U.S. information, intelligence, and military policy during the early stages of the Cold War (1947 – 1952). The study aims at revealing the mechanisms and motives behind the American instrumentalization of displaced people from Eastern Europe in the context of strategic confrontation with the Soviet Union. It analyzes the formation of refugee-run media initiatives (such as Voice of America, Radio Free Europe, and Radio Liberty), émigré military efforts, and legislative frameworks like the Mutual Security Act and the United States Escapee Program (USEP). By tracing these developments, the article seeks to demonstrate that refugees became not only symbols of anti-communist resistance, but also functional actors within the broader framework of the U.S.-Soviet geopolitical confrontation.

**Research Results.** At the outset of the Cold War, the U.S. military and political leadership found itself insufficiently prepared for a global confrontation with the Soviet Union, largely due to a lack of detailed knowledge about its adversary. As of 1948, the Central Intelligence Agency (CIA) employed only 38 Soviet experts (Sovietologists), most of whom had never visited the USSR. Among them, only twelve could speak Russian, and just one held an academic degree. To address this gap, the U.S. authorities began to recruit refugees and defectors – especially those with academic, technical, or military backgrounds – for participation in various projects. These engagements ranged from full-time positions in research institutions to short-term consultations and lectures on diverse aspects of the Soviet life, including governance, society, the armed forces, economy, industry, science, education, and culture.

One of the first structured initiatives was launched on 22 May 1947 with the establishment of “Team R” at the European Command Intelligence School (ECAI) in Oberammergau, Germany. This unit was tasked with providing linguistic and area studies training on the USSR to staff officers and military attaché personnel. The four-year program included coursework at Columbia University and was led by the U.S. Army Lieutenant Colonel Hoffman. Teaching staff were recruited among displaced people (DPs) from the Soviet Union residing in Bavarian refugee camps, as well as émigrés from Eastern Europe. Among them there was Abdurakhman Avtorkhanov, who conducted lectures on the Russian political

history of the 19th and 20th centuries, the structure and ideology of the Communist Party of the Soviet Union, and Soviet communist doctrine. Over time, this initiative evolved into the U.S. Army Russian Institute in Garmisch-Partenkirchen.

Additional intelligence-related efforts were launched by individuals such as Arnold Margolin, a prominent figure in the Ukrainian revolutionary movement and head of an officer intelligence school within the U.S. European Command. Margolin submitted a memorandum to the State Department analyzing the ideological leanings of Ukrainian and Russian DPs residing in the American occupation zone in Germany. He categorized the Ukrainians by regional origin – Great Ukraine (under Russian rule), Eastern Galicia, Bukovyna, and Carpathian Ukraine – and observed that roughly half leaned toward democratic ideas, one-third supported Stepan Bandera, and approximately 15% followed Andriy Melnyk. Notably, many émigrés from Soviet Ukraine expressed strong sympathies for the Hetmanate movement (National Archives and Records Administration NARA, National Archives at College Park NACP RG 59, M 1284, R. 70, imgs. 106–107).

Given the nascent state of the U.S. foreign intelligence, refugees from communism served as an invaluable source of firsthand information about life in the Soviet Union and the so-called “people’s democracies”. To fill the informational void regarding the everyday realities and internal decision-making processes of the USSR, American agencies also employed sociologists. A notable result of these efforts was the Harvard Refugee Interview Project (1948 – 1951) (Kodin, 2003, p. 85), which surveyed 12,500 individuals across 67 DP camps. One of the project’s key findings was that rejection of the Soviet regime among displaced people was not significantly correlated with ethnic background, professional qualifications, social status, or specific experiences under Soviet rule (Dubnitskii, 2014, p. 93).

It can be stated with confidence that the Cold War played a pivotal role in shaping American Sovietology. In 1946, with financial support from the Rockefeller Foundation, the Russian Institute was established at Columbia University. That same year, a similar program was launched at Stanford University, and in 1948, the Russian Research Center opened at Harvard University. In March 1948, John Davis authored a memorandum outlining the strategic use of refugees in the national interest of the United States, emphasizing the need to gather information to fill gaps in intelligence and in political-psychological operations (O’Connell, 1990, p. 200). Earlier, in July 1947, John Gardner, a senior official at the Carnegie Foundation, had submitted a report advocating for the systematic collection of open-source intelligence to better understand the functioning of the Soviet system. One of his key recommendations was the implementation of an extensive refugee interview program.

In 1948, George Fischer, a scholar affiliated with Harvard University, initiated a sociological study of postwar migrants from the Soviet Union. His objectives closely aligned with the prevailing political climate in the United States. Fischer proposed a mass survey aimed at exploring the structure of the Soviet army and the influence of military commanders and political officers, as well as assessing life in Soviet cities and the moral condition of Soviet society in the aftermath of World War II.

Harvard University, the Carnegie Foundation, the U.S. Department of State, and the U.S. Air Force Intelligence showed strong interest in this project. Under a contract signed on 23 June 1950 between Harvard University and the U.S. government, totaling \$160,000, fieldwork was conducted in displaced persons camps across Germany between 1950 and 1952 – at a time when many such camps were on the verge of closure. One of the project’s subcontractors was the Institute for the Study of the History and Culture of the USSR, founded on 8 July

1950 in Munich with funding from the American Committee for the Liberation of the Peoples of Russia and U.S. intelligence services. Scholars and specialists of the Soviet origin were actively involved in the project, including Kostiantyn Shtepa, Abdurakhman Avtorkhanov (alias Aleksandr Kunta), and Oleksandr Neryanin (alias Mykhailo Aldan). Institutional support was provided by Leo Fischer, a representative of the International Rescue Committee (IRC) in Germany and Austria.

In addition to participating in the Harvard Project, members of the institute pursued broader research on the theory and practice of the Soviet state and society. Their investigations encompassed historical, cultural, social, economic, national, and political issues of the Soviet peoples. They also sought to maintain academic contacts with German and international scholars and to foster mutual understanding between anti-communist émigrés from the USSR and the democratic world (Kodin, Troitskii, 2013, p. 157).

In September 1950, a team of 25 project members led by Raymond Bauer arrived in Munich. Eight additional employees from the Munich Institute also joined the effort. By May 1951, the interviews had been completed and data processing had begun. The results of the Harvard Refugee Interview Project included the publication of four monographs, thirty-five scholarly articles, and fifty-three reports (Kodin, 2003, p. 94).

In retrospect, George Fischer reassessed the underlying goals of the project. He came to believe that the U.S. government's true interest lay in identifying the strengths and weaknesses of the Soviet system, pinpointing topics that could capture public attention for propaganda purposes, and collecting intelligence that would help determine potential targets for strategic bombing in the event of war with the USSR (Fisher, 1997, p. 202).

The scholarly culmination of these efforts was George Fischer's doctoral dissertation, defended in 1952, which focused on opposition to Stalin within the Soviet Union during World War II (Fischer, 1952, p. 230). As a result of the sociologists' fieldwork, beyond the expected findings concerning the pervasiveness of ideology and citizen compliance, a significant rift between society and the Soviet regime was revealed – characterized by a psychological division of “us versus them.” This alienation was exacerbated by low living standards, invasive state interference in private life, and widespread political repression. The regime's stability, according to the research, rested primarily on the absence of viable alternatives, combined with public apathy and passive adaptation. Another identified factor behind the endurance of the Soviet system was its capacity to “absorb” dissent through a combination of information control and repressive enforcement. The researchers concluded that the population had largely reconciled itself to its condition, and that the prospects for any armed resistance to the regime were highly unlikely.

In parallel with these research and intelligence initiatives, the United States increasingly turned to refugees from communism in the development of its foreign broadcasting system. On 27 January 1948, President Harry Truman signed Public Law 80-402, known as the Smith-Mundt Act. This legislation redefined U.S. efforts to promote its image abroad, particularly behind the Iron Curtain, and explicitly aimed to counter communist propaganda. The expansion of American public diplomacy under this act envisioned the involvement of refugees from the Eastern Bloc as key participants.

For a time, restrictions were imposed on including refugee narratives in Voice of America (VOA) broadcasts. On 16 July 1948, Secretary of State George C. Marshall sent a directive to the heads of seven U.S. diplomatic missions in Eastern Europe, instructing them not to feature defectors on air. He argued that doing so might anger those who had remained in their

home countries and foster resentment toward political émigrés (Churchill, 1974, p. 425). At the same time, the State Department encouraged embassies to recommend suitable refugees for propaganda purposes. U.S. Ambassador to Moscow Walter Bedell Smith initially opposed broadcasting the voices of Soviet refugees, asserting that after the death of Leon Trotsky, no prominent opposition leaders remained among the Soviet émigré community (Churchill, 1974, p. 426). However, he would later reconsider this position.

On 12 August 1948, VOA aired a segment on Oksana Kasenkina, which, according to intelligence sources, received highly favorable reactions from listeners behind the Iron Curtain. Just over a month later, on 9 October 1948, two Soviet Air Force lieutenants, Anatoly Barsov and Petro Pyrohiv, landed their aircraft in the American occupation zone near Linz, Austria. They cited a VOA broadcast about life in the state of Virginia as a key influence in their decision to defect (Barrett, 1953, pp. 116–117). This incident helped shift State Department policy: officials increasingly embraced storytelling focused on the American way of life and the integration of refugees into the Western world.

On 1 September 1948, following a directive from the U.S. National Security Council, the Office of Special Projects (OSP) was established under the authority of the CIA, working closely with the State Department. The OSP was tasked with propaganda, economic subversion, and preventive measures such as sabotage, psychological warfare, and support for resistance movements. The first head of the office, Frank Wisner, advocated for expanding radio broadcasting by increasing funding and actively involving refugee organizations (Cull, 2008, p. 42).

After the Soviet Union and its allies implemented efforts to jam VOA broadcasts during the spring and summer of 1949, the State Department reassessed its information policy. On 21 June 1949, Acting Secretary of State James Webb issued an informal directive calling for the engagement of refugees as on-air commentators for programming aimed at Eastern Bloc countries (Slany, 1976, p. 289). These broadcasts featured refugees who exposed the realities of Stalinist terror, including the horrors of the Leningrad blockade, the operations of the NKVD and SMERSH, the risk of deportation to Siberia upon repatriation, renewed waves of repression under the guise of “anti-cosmopolitan” campaigns, and the falsehoods propagated by the Soviet press regarding Western life (Matthews, 1950, p. 5).

The first such media center was the Voice of America (VOA) radio station, originally established in 1942 under the authority of the U.S. Department of State. In 1947, based on a proposal by former U.S. Ambassador to the USSR William Averell Harriman, VOA began broadcasting in Russian to audiences in the Soviet Union and Eastern Bloc countries. Alexander Barmine, a former Soviet diplomat and intelligence officer, was recruited to help build the Russian-language service. The restructuring of the station’s programming was prompted by the need to conduct counter-propaganda in response to Soviet attempts to discredit American leaders (Whitton, 1951, p. 151). The U.S. strategists expected that the USSR would be unable to effectively counter such actions – its own broadcasting efforts toward the United States being weak – and that any repressive responses (such as radio jamming or confiscating receivers) would only underscore Soviet weakness and inadvertently boost VOA’s popularity.

Gradually, the Voice of America became a key instrument of American information policy. As a result, VOA began broadcasting in Ukrainian in 1949, followed by Lithuanian, Latvian, Estonian, Georgian, Armenian, and Azerbaijani in 1951.

According to István Deák, the most significant decision made by the U.S. authorities in supporting Eastern European political émigrés was the establishment of the Free Europe

Committee in New York on 1 June 1949. Its primary project was to launch non-governmental radio broadcasting to the countries of the Eastern Bloc, free from bureaucratic constraints. With the support of General Dwight D. Eisenhower and General Lucius D. Clay – commanders of the U.S. occupation forces in Europe – Radio Free Europe began transmissions from the Federal Republic of Germany on 4 July 1950. The broadcast studio was located in Munich, with a relay station in Lampertheim. Radio Free Europe targeted Soviet satellite countries and broadcast in Bulgarian, Czech, Slovak, Hungarian, Romanian, and Polish.

Political refugees were actively recruited for work in national editorial offices. For instance, the Hungarian service, launched in Munich in October 1951, included an exiled writer Gyula Borbándi; Margit Slachta, the first woman elected to Hungary's parliament, who had taken refuge in a Dominican monastery and fled the country in 1949; and a novelist and journalist Sándor Márai (Deák, 2002, p. 330). The Polish service, established in December 1951, was headed by Jan Nowak-Jeziorański, a veteran of the Warsaw Uprising (Zawodny, 1986, p. 317). The Romanian service was led by Mihai Fărcășanu, who had been sentenced to death in absentia by the Romanian communist regime and who had founded the Council of Romanian Democratic Parties in New York in 1948. Several defectors worked for multiple radio stations at once – for example, political émigré Ion Rațiu was employed by both the BBC and Radio Free Europe's Romanian sections, while former Czechoslovak Deputy Prime Minister Jaroslav Stránský collaborated with the Czechoslovak editorial teams at both stations.

For broadcasting specifically to the Soviet Union, the American Committee for the Liberation of the Peoples of Russia established Radio Liberty in 1951. The station operated continuously, with the Russian, Ukrainian, Armenian, Azerbaijani, Belarusian, Georgian, North Caucasian, Tatar-Bashkir, and Turkestan language services (Qualter, 1962, p. 130). It was funded by the U.S. Congress. Political refugees from the USSR and the Eastern Bloc were also employed at the station. For example, the North Caucasian section was organized by Abdurakhman Avtorkhanov, a former displaced person of Chechen origin.

When the USSR began jamming VOA signals, the U.S. Department of State commissioned American scholars in October 1950 to study the realities of psychological warfare and recommend new methods of propaganda. The result was Project Troy, a three-month collaboration involving 21 scientists – including historians, physicists, and psychologists – from Harvard University, the Massachusetts Institute of Technology, and the RAND Corporation. On 1 February 1951, project leader Lloyd Berkner submitted a final report to Secretary of State Dean Acheson, outlining various aspects of psychological warfare. Among the recommendations were the use of balloons to transmit radio signals over long distances and intensified engagement with defectors, whose numbers were estimated at approximately 1,500 per year (Needell, 1993, p. 419).

The State Department endorsed these recommendations and advised the Policy Planning Staff to use refugees in forecasting future developments in the USSR (Keane, 2007, p. 120). In response, President Truman created the Psychological Strategy Board on 4 April 1951.

With the outbreak of the Korean War, the U.S. Department of Defense approved the mobilization of 100,000 Americans. Official discussions began about forming volunteer units within the U.S. Army composed of Eastern European political émigrés, prompting numerous proposals and appeals.

Earlier, the idea of creating a “refugee army” had been voiced by Abo Fatalibey Dudanginski, head of the Azerbaijani Liberation Committee, during a conversation with U.S. Embassy officials in Cairo. A former major in the Red Army and active participant in

the German-backed Azerbaijani Legion, Dudanginski was residing in Egypt as the guest of the Grand Mufti of Palestine, Haj Amin al-Husseini. As a representative of Muslim refugees from the USSR, he advocated for the creation of a unified organization for stateless persons and exiles from Soviet territories, arguing that the organizational disunity of émigrés “benefited Stalin.” He proposed founding the “Union for the Liberation of Peoples Enslaved by Bolshevism,” to be inaugurated at a Refugee Congress organized by the Western powers in line with the principles of the Atlantic Charter.

According to Dudanginski’s plan, the Union would act as a counterbalance to Cominform and would include several structural divisions: a Department of Propaganda, a Department of Information, and a Liberation Army. He believed that refugees could become the most effective anti-Soviet propagandists for radio operations behind the Iron Curtain (NARA NACP, RG 59, M 1284, R. 70, imgs. 111–112). The political foundation of this movement, he argued, should be the principle of national self-determination. Dudanginski also condemned the actions of Alexander Kerensky, who, based on ideas of an “indivisible Russia,” had attempted to create a refugee organization in the United States. He criticized the State Department’s support for Kerensky, arguing that many refugees were ready to fight the USSR, provided the West guaranteed independence for non-Russian peoples – Ukrainians, Balts, Caucasians, and Tatars.

Shortly after the outbreak of the Korean War, General Władysław Anders arrived in the United States and proposed creating the Polish or broader East European exile army. His idea was supported by Republican Congressman Orland Armstrong from Missouri (Wandycz, 2002, p. 321). Meanwhile, on 4 July 1950, a group of Baltic refugees in Copenhagen petitioned the U.S. embassy, requesting to enlist as volunteers to fight communism in Korea (Baltic Refugees Seek to Join Korea Fighting, 1950, p. 1). Embassy officials replied that they had not yet received clear instructions on the matter.

In response to the war in Korea and the growing threat of renewed conflict in Europe (especially in Germany and Austria), Theodor Daniliw, Secretary-General of the Ukrainian American Displaced Persons Committee (ZUADK), appealed to the U.S. Ambassador in London. He requested assistance in relocating remaining Ukrainian DPs to Australia and South America (NARA NACP, Letter Sep. 27, 1950, RG 59, S. IRO and DPC, I. DPC, B. 1.).

The idea of forming military units composed of refugees and displaced people from Eastern Europe was also discussed during a meeting between Robert McClintock, First Secretary of the U.S. Embassy in Belgium, and Count Mihály Andrassy, a prominent figure in the Hungarian émigré community. Andrassy proposed assembling a 100,000-strong force drawn from nationals of countries behind the Iron Curtain. He estimated that of the 6,000 Hungarian refugees then residing in Belgium, approximately 2,000 would be suitable for military service (NARA NACP, Letter Jan. 17, 1951, RG. 59, S. IRO and DPC, I. DPC, B. 1). He suggested appointing General András Szákó – who maintained contact with the local leader of the Anti-Bolshevik Bloc of Nations (ABN), Mulkiwicz – as commander of the proposed force. This initiative likely reflected the growing momentum behind France’s proposal for a European Defense Community and the anticipated defense conference scheduled to take place in Paris in early 1951.

Soon thereafter, American diplomats were approached by representatives of the Russian Anti-Communist Special Group and the Group of Russian Anti-Communists, both based in the British occupation zone in Klagenfurt. These organizations represented the interests of some 700 former soldiers of Colonel Rogozhin’s Russian Protective Corps (a White émigré

military unit formed in Yugoslavia) and segments of the Russian Liberation Army (ROA), who had surrendered in 1945. Leaders of the Russian émigré movement requested that former “Vlasovites” and “Rogozhinites” be incorporated into the U.S. Army, with those unfit for combat assigned to propaganda units (NARA NACP, Letter May 28, 1951, RG 59, S. IRO and DPC, I. DPC, B. 1). The Soviet propaganda quickly exploited these appeals to circulate familiar ideological tropes, accusing the Western powers of arming Waffen-SS veterans and “former Nazi collaborators”.

Given the leadership role of the United States in the Korean conflict, the exiled leaders of the Carpatho-Rusyn Council, Vasyl Decha and Hryhoriy Korytko, appealed to the U.S. on 10 August 1950. They requested that 2,000 Rusyns housed in a displaced persons camp in Ludwigsburg, Germany, not be repatriated. Furthermore, the émigré leaders sought official recognition of their organization as a government-in-exile. In return for being welcomed into “the family of democratic nations,” they pledged to join the fight against communism in Korea (NARA NACP, Letter Sep. 19, 1950, RG 59, S. IRO and DPC, I. DPC, B. 1).

Later, on 31 October 1951, Jan Papánek, a representative of the American Relief Fund for Czechoslovak Refugees, wrote to U.S. High Commissioner for Germany John McCloy. In the context of what he described as a “clash between Western democracies and Moscow’s communist imperialism,” Papánek called for increased attention to the plight of Czechoslovak refugees, many of whom had fled after being inspired by Radio Free Europe broadcasts. A former diplomat, Papánek urged the U.S. to develop employment programs for young refugees and even proposed the formation of military units, as many of these individuals were eager to serve in uniform (NARA NACP, Memo Oct. 31, 1951, RG 59, S. IRO and DPC, I. DPC, B. 1).

Notably, on 16 October 1951, Philip Ryan, head of the International Refugee Organization (IRO) mission in the American occupation zone of Germany, proposed utilizing non-German refugees from Eastern Europe in military roles under NATO authority (NARA NACP, Proposal Oct. 16, 1951, RG 59, S. IRO and DPC, I. DPC, B. 1). Citing migration statistics – approximately 650 individuals entering the American zone monthly, out of 1,500–2,000 across Europe – he warned that after the IRO ceased operations, these individuals might be imprisoned for illegal border crossings rather than granted political asylum. In his assessment, the three main drivers of this wave of escapees were the success of the Marshall Plan, broadcasts from Voice of America and Radio Free Europe, and the creation of NATO. Consequently, Ryan proposed the establishment of national military units under NATO command and advocated recruiting family members of potential servicemen for support roles, such as medical staff or language specialists with regional expertise.

These proposals may have had some practical influence. On 20 January 1949, Ghemeto Dimitrov established the Bulgarian National Committee “Free and Independent Bulgaria” in the United States. In early 1951, he responded favourably to the U.S. initiative to establish a military unit composed of Bulgarian political émigrés. After a three-week recruitment campaign in refugee and displaced persons camps in France, Italy, Greece, Turkey, and Trieste, representatives of the BNC, in cooperation with American recruiters, succeeded in selecting 200 candidates for enlistment (Bulgaria for NATO, vol. 3, p. 375).

The Bulgarian National Volunteer Company No. 4093 was established by Order No. 53 of the Chief of Staff of the U.S. Forces in Western Germany on 20 October 1951. The unit was subordinated to the U.S. Seventh Army and stationed in the town of Zeilsheim, near Frankfurt am Main. Lieutenant Stefan Boidev was appointed as the company’s first commander. Non-

commissioned officer positions in the four platoons were filled by military personnel who had fled communist Bulgaria. This unit represented the first Bulgarian military formation within NATO, long before Bulgaria's formal accession to the Alliance.

The U.S. intelligence agencies also sought to use refugees in covert operations. Political émigrés played a central role in strategic plans for regime change in Albania, Bulgaria, and Romania. The most ambitious of these projects was Operation "Valuable Fiend," the CIA's first paramilitary operation, conducted jointly with British intelligence. The mission's objective was to organize an uprising in Albania – the least developed of the Eastern Bloc states (Lulushi, 2014, p. 12). In March 1949, intelligence officers from both nations convened in Washington, D.C., to discuss operational details. Although CIA analysts soon concluded that toppling Enver Hoxha's 85,000-strong armed forces was unlikely, U.S. Secretary of State Dean Acheson endorsed British Foreign Secretary Ernest Bevin's proposal to prepare for an "Albanian counter-revolution," especially amid reports that the USSR planned to construct a naval base near the port of Vlora.

The plan involved parachuting trained agents into central Albania, where royalist sentiment remained strong. Organizers anticipated that this would spark a broader popular revolt leading to civil war and the eventual overthrow of Hoxha's regime. To provide political cover, the National Committee for a Free Albania was formed in Paris on 7 July 1949. The committee served as a coordinating body for monarchist and republican elements of the Albanian diaspora. On 19 September 1949, during a special meeting at the U.S. State Department's Office of Southern European Affairs, the committee's first chairman, Mid'hat Frashëri, authorized the organization's headquarters to be established in New York (Slany, 1976, p. 318). CIA recruiters scouted Albanian refugees with military experience in camps across Italy, Greece, and Turkey (Noble, 2008, p. 58). The British trained some agents at Fort Binemma in Malta, while the Americans used a military base in Hohenbrunn, Germany ("Company 4000"). Royalist leader Abaz Kupi participated as an interpreter in the project.

Despite the infiltration of several teams between 1950 and 1952, all attempts to initiate an armed uprising in Albania ultimately failed, largely due to intelligence leaks via the British (Bethel, 2016, p. 64). Had the project succeeded, similar refugee-based subversive actions might have been launched in other Eastern Bloc countries. Parallel projects, including QKSTAIR-BGCONVOY (Bulgaria, April 1950) and QKBROIL (Romania, August 1951), remained in the planning stage and were never implemented.

On 8 December 1949, the U.S. National Security Council submitted recommendations to President Truman regarding American policy toward the Soviet Union's Eastern European satellite states, specifically Albania, Bulgaria, Poland, Romania, Hungary, and Czechoslovakia. Recommendation No. 43 called for the long-term establishment of non-totalitarian regimes in the region (Slany, 1976, pp. 53-54). Tactically, the aim was to encourage divisions within the communist world and promote "heretical communism" to destabilize ruling parties from within. Experts acknowledged that replacing pro-Soviet regimes with more Western-tolerant authoritarian governments would require political guarantees to potential national leaders. As such, it was recommended that the U.S. provide political asylum, increase financial assistance, and prepare a pool of trained political émigrés in the West.

In the early 1950s, the intensifying U.S.-Soviet rivalry elevated the importance of national security considerations, which were also leveraged to facilitate the admission of migrants into the United States. On 30 June 1950, Congress passed the Lodge-Philbin Act, authorizing the enlistment of 2,500 foreign nationals into the U.S. Armed Forces, with eligibility for U.S.

citizenship after five years of service. The program targeted individuals from Eastern Bloc countries and excluded citizens of NATO member states, the Federal Republic of Germany, and nations participating in the Marshall Plan (Carafano, 1991, pp. 65–66). Within a year, the first group of volunteers was sworn in as part of the 7720th Replacement Depot in Sonthofen, Germany.

The Korean crisis underscored the risk of direct military conflict with the USSR, prompting the U.S. government to increase funding for anti-Soviet initiatives. On 24 May 1951, President Truman addressed Congress to propose a large-scale foreign aid program to prevent the spread of communism in economically vulnerable countries. On 14 August 1951, Representative James “Dick” Richards of South Carolina introduced bill HR 5113. The House passed it on 18 August (238 votes in favor, 122 against), followed by Senate approval on 22 September (55 in favor, 24 against). The Mutual Security Act, signed by Truman on 10 October 1951, established the Mutual Security Agency, replacing the Economic Cooperation Administration. Section 1, Article 101 of the Act allocated up to \$100 million to support persons residing in, or fleeing from, the USSR or other communist-controlled countries (Poland, Czechoslovakia, Hungary, Romania, Bulgaria, Albania, Lithuania, Latvia, Estonia), as well as Soviet-occupied zones in Germany and Austria.

This provision drew sharp criticism from the USSR. On 10 January 1952, the Soviet delegation to the United Nations denounced it as an act of interference in Soviet internal affairs and a provocation intended to fuel anti-communist sentiment. The Americans were accused of violating the Roosevelt-Litvinov agreements of 1933 (Report by POTUS, 1952, p. 57). In response, Congressman Michael Mansfield accused the USSR of subversive activities worldwide and defended the law as a guarantee of rights for political refugees.

In the final year of his presidency, Truman introduced several initiatives aimed at assisting “Cold War refugees”. On 24 March 1952, he launched the United States Escapee Program (USEP), set to begin in April 1952 (Truman, 1966, pp. 209–215). The program aimed to resettle 10,000 individuals who had fled the Eastern Bloc after 1 January 1948 and were still living in camps across Germany. Eligibility extended to ethnic Germans and Eastern European expellees (Volksdeutsche), ethnic Turks from Bulgaria, Greek Romanians, and Yugoslav nationals. The program was administered by the State Department and the Office of Refugee Affairs. At the time of its launch, an estimated 250,000 escapees were residing in over 200 camps in the Western zones of Austria and Germany (Stoessinger, 1956, pp. 176–177).

Earlier, the issue of “refugees from communist pressure” had been raised at the Brussels Conference of 1951, where the U.S. representatives advocated for their classification as a distinct group within the framework of the International Migration Plan. Countries willing to accept such individuals on a transit basis were to receive specific benefits as “first asylum states” (O’Connor, 1952, p. 402). The draft Mutual Security Act included a provision for allocating ten million U.S. dollars to finance International Refugee Organization (IRO) operations. Utilizing Article 101 of the 1951 Mutual Security Act, \$4.3 million was earmarked specifically for the United States Escapee Program (USEP). This initiative was fully supported by W. Averell Harriman, Director of the Mutual Security Agency, who viewed U.S. assistance to NATO allies in alleviating demographic pressure and structural unemployment as a peaceful effort to promote political and economic stability.

The plight of refugees from the Eastern Bloc drew considerable attention from the American public. Their most vocal advocate was the International Rescue Committee (IRC), officially registered with the U.S. State Department. The committee included such prominent

figures as Richard Byrd, Sumner Welles, Eleanor Roosevelt, Charles Taft, and other American politicians and public figures (NARA NACP, Letter Jul. 19, 1949, RG 59, M. 1284, R. 70). In 1949, the IRC launched a campaign to support refugees from behind the Iron Curtain, raising funds and distributing CARE packages with essential supplies.

On 3 November 1950, retired U.S. Air Force Chief of Staff General Carl Spaatz appealed to the American people to raise one million dollars for “refugees from the Iron Curtain” (Million to Finance ‘Iron Curtain Refugee’ Aid Urged by Spaatz, 1950, p. 25). The funds were managed by IRC Director David Martin. According to General Spaatz, the U.S. military lacked the resources to assist these individuals, but aiding “Cold War refugees” served not only humanitarian goals but also contributed to national security. He also revealed that the IRC had enlisted the assistance of an unnamed Soviet defector – an expert in physics who was subsequently involved in the American nuclear program.

**Conclusions.** In the early Cold War years, refugees from communism became important contributors to the U.S. foreign and security policy. Beyond their humanitarian status, they served as sources of intelligence, participants in psychological operations, and communicators of American ideals. Their knowledge and ideological stance helped U.S. institutions counter Soviet influence both at home and abroad.

Government agencies, in cooperation with émigré organizations and academic centres, developed programs such as the Harvard Refugee Interview Project and Radio Free Europe. These initiatives institutionalized the role of refugees in gathering information and promoting democratic narratives.

Policy-makers also considered military uses of refugee manpower, leading to efforts like the creation of the Bulgarian National Volunteer Company and proposals for exile armies. Legislation such as the Mutual Security Act and the USEP reflected an integrated approach to aid and strategy.

The U.S. experience with “refugees from communism” illustrates the intersection of humanitarian policy and national interest during the Cold War. It highlights how migration became a tool of soft power and strategic communication in the broader geopolitical confrontation with the Soviet bloc.

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**LIV ORGANIZATION OF TARAS SHEVCHENKO UKRAINIAN LANGUAGE SOCIETY: AT THE SOURCES OF THE NATIONAL DEMOCRATIC MOVEMENT (THE END OF THE 80s – THE BEGINNING OF THE 90s OF THE 20th CENTURY)**

**Abstract.** *The purpose of the study is to clarify, based on archival sources and field material, the specifics and exceptional circumstances of Lviv organization foundation of the Taras Shevchenko Ukrainian Language Society in 1988, in particular; to trace the transformation of the constituent assembly from a closed format into a mass street protest as a reaction to the prohibitive actions of the then pro-Russian communist authorities. The methodological basis of the research is adherence to the principle of historical objectivity and impartiality in the interpretation of historical facts. In the research there have been used the methods of critical and structural analysis and classification, systematization and verification of unpublished archival sources and interviews. The application of the historical genetic method made it possible to reconstruct the cause-and-effect link between the administrative pressure of the Communist Party structures and radicalization of the patriotic Lviv community, which resulted in the mass street protests of the June days of 1988. Scientific Novelty.*

For the first time, events unknown to the general public related to the features of Lviv branch of the TUM official registration have been reconstructed. It has been found that the first mass Lviv rally on June 13, 1988, during which the Taras Shevchenko Ukrainian Language Society foundation was publicly announced, acquired a street and open character due to the disorganizational actions of the then communist authorities. **Conclusion.** The Communist Party leadership, having initially granted permission to hold the founding conference in the premises of the Lviv House of Culture “Budivelnik”, cancelled it at the last moment, blocking the entrance for delegates. This fact forced the community to change the event format and move to the monument to Ivan Franko opposite Lviv State University spontaneously, turning the meeting into a public demonstration. This event became the point of no return for the Ukrainian national revival on the republican scale. Having become the foundation of local multi-party system, the Taras Shevchenko Ukrainian Language Society not only played a key role in the communist power overthrow in the 1990 elections, but also prepared the state consciousness of Lviv residents in advance.

**Key words:** the Taras Shevchenko Ukrainian Language Society, national democratic movement, “informals”, labour collectives, “rally marathon”, pro-Russian communist government.

### ЛЬВІВСЬКА ОРГАНІЗАЦІЯ ТОВАРИСТВА УКРАЇНСЬКОЇ МОВИ ІМЕНІ ТАРАСА ШЕВЧЕНКА: БІЛЯ ВИТОКІВ НАЦІОНАЛЬНО- ДЕМОКРАТИЧНОГО РУХУ КІНЦЯ 80-х – ПОЧАТКУ 90-х рр. XX ст.

**Анотація. Мета дослідження** – на основі архівних джерел і польового матеріалу з’ясувати специфіку та виняткові обставини створення Львівської організації Товариства української мови імені Тараса Шевченка у 1988 р., зокрема простежити трансформацію установчих зборів із закритого формату у масовий вуличний протест як реакцію на заборонні дії тогочасної проросійської комуністичної влади. **Методологічною основою** статті є дотримання принципу історичної об’єктивності й неупередженості у трактуванні історичних фактів. У ході дослідження використано методи критичного і структурного аналізу та класифікації, систематизації й верифікації неопублікованих архівних джерел та інтерв’ю. Застосування історико-генетичного методу дало змогу реконструювати причинно-наслідковий зв’язок між адміністративним тиском компартійних структур і радикалізацією патріотичної львівської громади, що вилилася у масові вуличні протести червневих днів 1988 р. **Наукова новизна.** Уперше реконструйовано невідомі широкому загалу події пов’язані із особливостям офіційного оформлення львівського осередку ТУМу. З’ясовано, що перший масовий львівський мітинг 13 червня 1988 р., під час якого було публічно проголошено його створення, набув вуличного та відкритого характеру через дезорганізаційні дії тогочасної комуністичної влади. **Висновок.** Компартійне керівництво, спочатку надавши дозвіл на проведення установчої конференції в приміщенні львівського Будинку культури “Будівельник”, в останній момент скасувало його, заблокувавши вхід для делегатів. Це змусило громаду змінити формат заходу і стихійно рушити до пам’ятника Іванові Франку навпроти Львівського державного університету імені Івана Франка, перетворивши засідання на прилюдну демонстрацію. Ця подія стала точкою неповернення для українського національного відродження республіканського масштабу. Виступивши фундаментом місцевої багатопартійності, ТУМ не лише відіграло ключову роль у поваленні комуністичної влади на виборах 1990 р., а й задалегідь підготувало державницьку свідомість львів’ян.

**Ключові слова:** ТУМ, національно-демократичний рух, “неформали”, трудові колективи, “мітинговий маршфон”, проросійська комуністична влада.

**Problem Statement.** The coming fortieth anniversary of the founding of the first most massive public organization of Ukraine during the period of restoration of state independence prompts a deep rethinking of the events of the end of the 1980s. It is the Taras Shevchenko Ukrainian Language Society (TUM), the founding conference of which was held in Kyiv on February 11–12, 1989. The first chairman of the Society was Dmytro Pavlychko, and later

the organization was headed by Pavlo Movchan. However, the Lviv regional organization of TUM was founded a year earlier – on June 20, 1988. This period is known in the history of the city as the “ten days that shook Lviv”. The process of founding the Society began at the first mass rally unauthorized by the authorities, which spontaneously gathered at the square between Lviv University and the monument to Ivan Franko. It caused real fear and confusion among the local party nomenclature and its subordinate power structures and demonstrated unpreparedness for the challenges of new historical realities. The key merit of the organization was to consolidate the patriotically minded Lviv public around the national idea, even before the formation of political parties of that time – the People's Movement of Ukraine for Perestroika and the Ukrainian Republican Party. In those years, the agonizing Soviet Union approached its natural fiasco, but it still remained the world's largest autocracy of the Russian imperial type.

The fact is that in the second half of the 1980s the entire logic of the USSR historical development pointed at its expected finale – the launch of irreversible destructive processes that led to the dismantling of the existing order in it, and as a consequence, to its collapse. The forcibly founded “evil empire” led by the communists naturally came to a rapidly growing socio-economic, and later political crisis. Its main causes were a complex of long-standing industrial, national, religious, and party problems that had accumulated in a multi-ethnic state formed through the Russian annexation of neighbouring peoples, their subsequent forced communization, and then russification. For the ruling CPSU, this situation threatened the loss of its monopoly on power, which the multidimensional crisis made more than possible. Therefore, in 1985 – 1986, the new head of state, General Secretary of the CPSU Central Committee Mykhailo Gorbachev, dared to embark on “perestroika”, introducing segmental market innovations in the economic sphere and partial democratic tools in the political sphere.

However, the integration of market foreign elements into the planned economic background naturally deepened the production problems and lowered the material situation of the country's citizens significantly. The result was the need to reform the political and party superstructure of the country, which manifested itself in the form of a formal power transfer into the hands of Soviet institutions and a number of similar reforms in the CPSU. They weakened the communist regime on the ground and strengthened the peoples' aspirations captured by the Russians for national self-determination.

The scientific novelty of the article consists in the reconstruction of the little-known circumstances of June 13, 1988, which initiated the phenomenon of the “rally marathon” in Lviv and gave impetus to the liberation of Ukraine from the Russian-Soviet rule through parliamentary means. Thus, the first mass anti-communist demonstration was the result of community self-organization in response to the contradictory actions of the authorities: first granting permission for the statutory conference of the TUM in the premises of the BC “Buhivelnik”, and then its sudden cancellation at the last moment. This administrative pressure provoked a spontaneous outpouring of activists into the public space, turning the planned closed event into the first large-scale public rally, which became the catalyst for further struggle for state independence.

As a result, during the half-century of the Russian-Soviet occupation, the national beliefs of the Lviv community remained latent, always ready to quickly become active under favourable circumstances. Therefore, it is natural that the activator and catalyst of anti-Soviet, i.e. anti-Russian actions were the unions not controlled by the CPSU, which were the first to awaken the patriotic consciousness of Galician Ukrainians, dormant by the

Russians. First of all, the branches of the Taras Shevchenko Ukrainian Language Society are meant. Their activity in the environment of large labour collectives, where “informals” and dissidents had limited access, was advantageously distinguished from human rights and “informal” movements. The fact is that the Councils of Labour Collectives (CLCs), initiated by the “Law on State Enterprises (Associations)” in 1987, could influence the decisions of the communist authorities weakened by “perestroika” due to their own size and special status of workers (Vilna Ukraina, 1987, pp. 1–4).

**The source base** of the research is unpublished materials of the communist party records, which are stored in the State Archives of Lviv region. Its funds include: F-3 “Lviv Regional Committee of the Communist Party of Ukraine”, F-4 “Lviv City Committee of the Communist Party of Ukraine” and F-359 “Party Committee of the VO “Kinescope”. Periodicals and eyewitness recollections were also useful.

**Review of Recent Research and Publications.** The elucidation of the reasons for the revival, vectors of development and consequences of the national democratic and liberation movement development in Lviv and the western regions of the Ukrainian SSR at the turn of the 80s and 90s of the 20th century was the subject of studies by domestic researchers. Such scholars as Volodymyr Baran (Baran, 2003), Ihor Pidkova (Pidkova, 2001), Oleh Muravskyi (Muravskyi, 2011), Stepan Kobuta (Kobuta, et al., 2002), Mykola Aliksiievets (Aliksiievets, et al., 1993), Oleh Maliarchuk and Oksana Kohut (Maliarchuk, & Kohut, 2021) and Vasyl Chura (Chura, 2013a, 2021b) continue doing the research in this direction. In all-Ukrainian format, the processes of the collapse of the USSR are studied by Stanislav Kulchytskyi (Kulchytskyi, et al, 2000), Heorhiy Kasianov (Kasianov, 1995), Anatoliiy Rusnachenko (Rusnachenko, 1998). Among scientific achievements of recent years, the studies by Yuri Kahanov (Kahanov, 2019) Iryna Ovchar (Ovchar, 2011), Aysel Omarova (Omarova, 2017), Serhiy Plokhii (Plokhii, 2019), Volodymyr Tarasov (Tarasov, 2016), Oleksandr Tertychnyi (Tertychnyi, 2014), Oleksandr Boiko (Boiko, 2021), Yuriy Shapoval and Oleksandr Yakubets (Shapoval, & Yakubets, 2021) and Oleksandr Zinchenko (Zinchenko, 2024) stand out. In the context of scientific articles, the focus was on the problem of factors and ways of restoring Ukraine's state independence by such scholars as Iryna Matiash (Matiash, 2024), Petro Bondarchuk (Bondarchuk, 2024), Ruslana Potapenko (Potapenko, 2021), Vitaliy Kotsur and Yuriy Voitenko (Kotsur, & Voitenko, 2023), Svitlana Lukianchenko and Iryna Zvonko (Lukianchenko, & Zvonko, 2023), Oleksiy Sukhyi and Petro Datskiv (Sukhyi, & Datskiv, 2021).

However, the very understanding of the activation factors and detailed factography of anti-communist demonstrations development in Lviv in the late 1980s still remain beyond the research focus of domestic scholars. Therefore, the authors set the goal of reconstructing in detail the chronicle of the national organization foundation uncontrolled by the communist authorities, which became the awakener of the national consciousness of Lviv residents and the primary basis for the emergence of a wide range of anti-communist unions.

One of the regions of the Ukrainian SSR that was the last to become part of the USSR, and therefore where the national liberation idea was not erased from the people's memory, was Galicia with its historical centre – Lviv. Therefore, the exhaustion of the pro-Russian communist regime in these territories had the most noticeable reception among the long-time patriotically inclined Ukrainian society, which was just waiting for the right moment to join the national movement for the restoration of Ukraine's state independence. The prologue to this situation was the national democratic movement, which took shape in dissident groups created at the crest of “perestroika” reforms in the Councils of Labour Collectives (RTK),

passed the stage of “informal” societies, and was embodied in numerous national associations and political parties.

**Research Results.** The Lviv organization of the TUM was finally founded in the summer of 1988, at the time when “perestroika” transformed from an economic format into a political one. This process was initiated by the 19th All-Union Party Conference, which proclaimed political reform in the state. But the roots of the emergence of local branches of the Society of the Native Language (TRM), as they initially called themselves, date back to 1986, when the 27th Congress of the CPSU proclaimed “perestroika”, the ideological core of which was “glasnost”, as a policy of measured openness in the activities of the Soviet party, state, and other institutions and mass media.

In combination with growing material hardships and disintegration processes within the party, and against the backdrop of patriotic attitude of Lviv residents, “perestroika” led to the formation of national unions of educational, debating, local history, artistic, and cultural types that were not subject to the CPSU. At the stage of formation, they were called “informals” due to the lack of registration in the Soviet state institutions. Simultaneously with the deployment of “perestroika” innovations, the educational segment of the national revival began to be united by the organization, which was later called the Taras Shevchenko Native Language Society.

With the support of the RTK, which was largely outside the influence of administrations, party committees, and trade union committees, the Taras Shevchenko Native Language Society branches gradually gained legality due to the favourable attitude of workers, rank-and-file employees, and local personnel of the middle and lower management levels. Not least – grassroots communists. We should not forget the fact that the Taras Shevchenko Native Language Society, at least somehow, guaranteed protection from the regional committee's arbitrariness, which even during the years of “perestroika” continued to impose the Russian ideological connotations. In this way, even before official recognition, these centres became a semi-legitimate cover for the national self-identification of ordinary Lviv residents and their unification with the participants of the dissident movement, who at that time were returning from the communist exile and introducing political content into the educational activities of the future of the Taras Shevchenko Ukrainian Language Society.

Secret Communist Party documents show that the first Taras Shevchenko Native Language Society cells in Lviv declared themselves at the turn of 1987 – 1988. The Ideological Department of the regional committee prepared a list of unregistered educational associations in Lviv region, whose activities required constant control. There were 3,115 of them. The Taras Shevchenko Native Language Society was prominent among them. It was joined by the public movement “Friends of Ukrainian Art and Literature”, the Ivan Franko Ethnological Society, the Association of Youth Clubs and the City Discussion Club, and the cultural and ecological Lev Society. Party committee secretaries and enterprise directors were obliged to monitor their activities and, in the event of anti-Soviet manifestations, to influence leaders and supporters through administrative pressure (The State Archive of the Lviv Region (SALR), f. 3. d. 62, c. 367, pp. 53–62).

Despite this, at the beginning of 1988, the self-created Taras Shevchenko Native Language Society organizations rapidly emerged in all institutions of Lviv, with the exception of party and security structures. The first cells appeared in the Lviv branches of the Cultural Fund, the Writers' Union, the Society for the Protection of Historical and Cultural Monuments, Lviv State University, the Polytechnic Institute, the Printing Institute, the Institute of Applied

Arts, the Agricultural Institute, the Medical Institute, the Institute of Social Sciences, in VO Lenin, “Kinescope”, “Electron”, “Progress”, “Svitanok” REMA, LAZ, the Insulation Plant, the Milling Machine Plant, in museums, technical schools, colleges and schools of the city. According to secret regional party committee data, at the end of 1988, 138 of the TUM cells operated in Lviv (SALR, f. 3. d. 62, c. 300, p. 16).

In labour collectives, they were initiated by local unofficial leaders and patriotic individuals, and supported by caring colleagues and like-minded people. Usually, they were not leading communists or administrative officials. As ordinary employees of industrial enterprises, educational and scientific institutions, cultural institutions, medical institutions, etc., they organized political debates on the deepening of “perestroika”, disputes about the status of the native language and literature and history of Ukraine, arranged creative meetings with representatives of Ukrainian culture, they held evenings in memory of figures of national history and celebrated memorable dates, arranged and honoured architectural monuments and cemeteries where they held solemn gatherings, spread patriotic awareness, prepared exhibitions of national art works, held concerts of musical, dance and drama groups, participated in public liturgies and celebrations of religious holidays and ceremonies, and organized local history trips and excursions.

The aforementioned educational activities spread around the figures of Taras Shevchenko and Ivan Franko, who were recognized by the Russians in their own way as titans of the Ukrainian spirit, which guaranteed to narrow the range of communist persecution. In addition, the aforementioned pro-Ukrainian actions stood out against the background of alien communist propaganda significantly, which spread more than noticeable Russian narratives.

Thus, unlike the youth “informal” unions, the development of the TUM activity covered wide segments of Lviv residents, since it took place at their place of work. This turned the associates of the society into awakeners of the patriotic consciousness of the townspeople as a whole. In this way, the “informal” movement grew into the process of creating national unions, which in turn became the harbingers of the emergence of anti-communist political parties.

The unification of the Taras Shevchenko Native Language Society branches and the proclamation of Lviv organization of the Taras Shevchenko Ukrainian Language Society began when, on April 14, 1988, the Kyiv newspaper “Literary Ukraine” published an article demanding that Lviv residents register an organization that would protect the Ukrainian language in Ukraine. The initiative was immediately supported by members of the Lviv branch of the Cultural Foundation – Rostyslav Bratun, Emmanuel Mysko, Orest Sheika and Natalia Chavaha. Executive functions were taken on by Ihor Melnyk, Ivanna Krypiakevych, Vasyl Repetylo, Maria Bazeliuk, Bohdan Vovk, Maria Babiy, Yaroslav Rybak, Oleksandra Byk, Olha Kroyvtska, Yevhen Zhrebetsky, Hanna Voitiv, Vsevolod Iskiv, Petro Mavko and the others (Melnyk, 2013).

The founding meeting was scheduled for six o'clock in the evening on June 13, 1988, in the Budivelnik Cultural Centre, located at 16a Vasyl Stefanyk Street. This building, built in Austrian times according to the design of Alfred Zakharevich, where the Ukrainian theatre “Cricket” and the cinema “Vulyk” operated during the Polish period, belonged to the communal trust “Lvivgaz” and was used as a club for leisure activities. Therefore, Lviv residents called it “Gas” in everyday life.

On the eve of the events described, on June 11–12, 1988, the third illegal meeting of representatives of Ukrainian, Baltic, and Transcaucasian human rights groups of the Soviet

Union was held in Lviv, after meetings in Yerevan and Tbilisi. A secret political body was founded there – the Coordinating Committee of Patriotic Movements of the Peoples of the USSR. The participants of the meeting approved a number of documents, including the “Statement on the Creation of the Coordinating Committee of Patriotic Movements of the Peoples of the USSR”, “Appeal of the International Committee of Political Prisoners to the Soviet Government”, “Letter to US President Ronald Reagan”, “Final Statement of the Lviv Meeting of Representatives of National Democratic Movements of the Peoples of the USSR”. They were signed by Viacheslav Chornovil, Bohdan and Mykhailo Horyn, Zynoviy Krasivskyi, Oles Serhiyenko, Stepan Khmara, Pavlo Skochok (Ukraine), Merab Kostava (Georgia), Ivas Zhukovskis, Antanas Terliackas, Evgenius Krukovskis (Lithuania), Lagle Parek, Mati Vilu (Estonia).

The leaders of the multinational human rights movement in the USSR placed special hopes on this organization in the context of the peaceful struggle against the Russian communist regime in the regions of the country. They saw it as an effective tool for participation in the upcoming elections to the Union and Republican Councils, and most importantly, to local self-government bodies. There was much talk of consolidating the forces opposing the ruling regime on the Union background and uniting with the disparate Moscow and Leningrad dissident leaders who were already at large.

The recollections of Maria, the wife of the famous human rights activist Ivan Hel, shed light on the dissident scenarios of the development of the anti-communist movement in western Ukraine. In an interview, she noted that in 1985–1988, during secret meetings of Viacheslav Chornovil, Ivan Hel, Mykhailo, and Bohdan Horyn, in Lviv and the villages near Lviv, they saw the following of the development of events. The outlines include uniting with dissidents from all republics and founding a single “perestroika-human rights” organization, establishing ties with foreign Ukrainian centres, domestic and world political leaders, prominent public figures and well-known religious hierarchs, educational work among the personnel of the city’s enterprises and organizations, fighting to restore the activities of the UGCC, publicizing the socio-economic failure of the party apparatus, holding sanctioned meetings, etc. (Archives of the Memorial Museum “Tyurma na Lonskoho”, Interview with Maria Hel (born in 1936), July 2013, Lviv, Lviv region, interviewer I. Derejany).

But the rapid unfolding of events in the summer of 1988 dictated an unexpected scenario. It rapidly burst into democratic development and many times exceeded the patriotic expectations of even the most radical dissidents and “informals”.

The head of the KGB Department in Lviv region, Stanislav Malyk, repeatedly reported to the first secretary of the regional committee, Yakiv Pohrebniak, that, parasitizing on “perestroika” and “glasnost”, individuals previously convicted of anti-Soviet activities were inciting Lviv residents to form unregistered associations such as native language societies, cultural heritage protection societies, historical and local history research societies, etc. Posing as a democrat and liberal, Kyiv resident Yakiv Pohrebniak, who was appointed the previous year, gave verbal consent to hold the TUM constituent assembly at the Budivelnik House of Culture. But then he got scared and secretly ordered the secretary for ideology of the city party committee, Adam Martyniuk, to prevent the event from taking place. Apparently, he did not do so without the “advice” of the second secretary of the regional committee, Vasyl Sviatotsky, and the newly appointed “third” secretary for ideology, Volodymyr Honcharuk. Therefore, on the day of the meeting, Adam Martyniuk called the director of the institution, Vasyl Mazur, known for his liberalism, and forbade them to be held. The latter carried out the

order, referring either to repairs or to holding another event. Martyniuk entrusted the head of the ideological department of the city committee, Oleksandr Maslianyk, with monitoring the implementation of the order (SALR, f. 3. d. 62, c. 300, p. 50).

The outraged participants of the meeting, who arrived after the end of the working day, found themselves in front of the closed gates. The scale of the gathering is confirmed by the testimony of one of the authors of the article, Professor Viktor Holubek. Returning from the Lviv Polytechnic Institute, he observed how a large and excited gathering of citizens, numbering about 300 people, filled the roadway of Stefanyk Street opposite the entrance to “Budivelnik” Culture House and later moved towards Lviv State University (Personal archiv interview with Victor Golubko (born in 1964), June 2024, Lviv, Lviv region, interviewer V. Chura).

In this way, the participants supported the calls of Ivan Makar and Yaroslav Putko to go to the monument to Ivan Franko to hold a disrupted meeting there. Thus, on Monday, June 13, 1988, the first spontaneous rally in Lviv during the “perestroika” era began, which, as a result of the communist lie, stirred the patriotic consciousness of Ukrainians throughout the republic. Owing to “Chereztyny Radio,” about 800 people took part in it. The meeting was attended by Mykhailo Horyn, Ivan Makar, Yevhen Hryniv, Yaroslav Putko, Iryna Kalynets, Roman Krypiakevych, Vasyl Repetylo, Pavlo Sheremeta, Maria Babiy, Yuriy Voloshchak, Natalia Ditchuk, Vitaliy Protsiuk, Anatoliy Kosianchuk, Hanna Ivanytska, Nazar Novosad (Melnyk, 2013).

A temporary council of the TUM was immediately elected (soon this name became generally accepted), which included Roman Ivanychuk, Ihor Melnyk, Ivan Makar, Mykhailo Kosiv, Iryna Kalynets, Yaroslav Putko, Pavlo Sheremeta, Vasyl Repetylo, Anatoliy Kosianchuk, Yevhen Hryniv, Serhiy Sokurov, Roman Krypiakevych, Vitaliy Protsiuk, Ivan Lytvyn, Hanna Voitiv, Oleksandra Byk, Roman Tertula (Melnyk, 2013). In their speeches, they publicly obliged Lviv party leaders to give a public answer to the question of why the constituent assembly could not take place. The answer was supposed to be given in three days. To this end, the next rally was scheduled for Thursday, June 16, at the same place (SALR, f. 3. d. 62, c. 327, p. 10).

Due to the exceptional publicity of the Communist Party deception, on June 16 the rally gathered from 5 to 10 thousand participants. The first secretary of the city committee Viktor Volkov was present, and the head of the regional KGB department Stanislav Malyk was afraid of the meeting. Despite the city leader's explanation about the need to go through the registration procedure, the gathering scheduled a constituent meeting of the TUM for June 20, 1988 in the assembly hall of the same institution, where the meeting had not taken place. To monitor the fulfillment of party promises, regular rallies were initiated, which were to take place on the first Thursday of each month near the monument to Ivan Franko. Since then, “Lviv Thursdays,” as the townspeople called them, had become a real school of democracy to them, which burst into everyday life like a whirlwind. In order for the city party authorities not to disrupt the TUM meeting again, it was decided to hold a crowded meeting the day after it ended. That is, on June 21, at the square near the “Druzhba” stadium (SALR, f. 3. d. 62, c. 327, pp. 53–62).

Frightened by the development of events, the first secretary of the regional committee, Yakiv Pohrebniak, gave permission again to hold the constituent assembly of the TUM on June 20 at the “Budivelnik” cultural centre. There, in the presence of several thousand participants, after many hours of debate, the charter of the Society was approved, which,

due to the broad support of Lviv residents, was finally granted the right to register with the relevant city authorities. The head of the Lviv regional organization of the TUM was the famous writer Roman Ivanychuk. The goal of the activity was to demand that the authorities grant the Ukrainian language state status, which was widely associated as a step towards restoring the political independence of Ukraine (SALR, f. 3. d. 62, c. 367, p. 24). Interestingly, the 19th All-Union Party Conference, which proclaimed political reform in the USSR, started in Moscow only a week later – on June 28, 1988.

The governing bodies of the TUM included Mykhailo Kosiv, Bohdan Horyn, Rostyslav Bratun, Ihor Melnyk, Mykola Kolessa, Roman Lubkivskyi, Vsevolod Iskiv, Ivan Makar, Yuriy Zyma, Teofil Komarynets, Maria Baiko, Oleksandra Byk, Mykola Holiarchuk, Hanna Voitiv, Roksoliana Zorivchak, Oleksandra Zakharkiv, Mykola Katsal, Ihor Karkhut, Ivan Lytvyn, Ihor Kudyn, Pavlo Romaniuk, Mykola Petrenko, Vasyl Repetylo, Pavlo Skochiy, Maria Chumarna, Roman Tertula, Ivan Shvets, Maria Shun (Melnyk, 2013).

However, on the morning of June 21, Lviv residents saw published rules for holding mass events in their mailboxes, which indicated the mandatory need to obtain permission from the authorities. Viacheslav Chornovil, Iryna Kalynets, and Ivan Makar were summoned to the regional prosecutor's office and warned of the consequences of illegal actions. The planned rally near the “Druzhba” stadium encountered police encirclement from the outside and the actions of provocateurs from the inside. It was obvious that the communist authorities were ready to respond with harsh force.

Therefore, having understood the attempts of the head of Lenin district executive committee of Lviv, Vasyl Lytiuha, to ban the rally, and if that fails, to hold it according to the regional committee's scenario, the demonstrators went to the city center and convened a people's assembly near the Opera and Ballet Theatre, where Ihor Kalynets and Yuriy Voloshchak made speeches. Thus, the “rally marathon” was founded in the central part of Lviv, where it attracted the attention of both residents and guests of the city. In addition, in response to the violent pressure of the authorities, it was decided to launch systematic public gatherings in all suitable locations in the city. On June 23, the protesters held the first mass memorial service at the Lychakiv Cemetery near the graves of Ukrainian patriots tortured by the communist authorities at the beginning of World War I (SALR, f. 4. d. 49, c. 99, pp. 1–2).

Thus, ten days – from June 13 to 23 – not only shook Lviv, but also proclaimed the creation of the Lviv regional organization of the Taras Shevchenko Ukrainian Language Society and launched the “rally marathon” directed against the communist government throughout Ukraine. This launch received publicity not only in the USSR, but also far beyond its borders. The most famous world media, the Ukrainian press in the diaspora, and the dissident samizdat of many Soviet republics declared that Lviv had given impetus to a new unarmed stage of the struggle against the “empire of evil”. But the newspaper of the city committee of the party “Lvivska Pravda” in the article “Rally Marathon” called these events extremist actions of nationalist gatherings (Dombrovska, et al, 1989, p. 3).

Thus, on July 6, a 30,000-strong rally was held near the SKA stadium in support of the registration of the first Ukrainian political force of the time, the People's Movement of Ukraine for Perestroika. The demonstrators raised about 30 national flags and chanted the slogan “Down with the CPSU!”. On July 7, Lviv regional party committee members unsuccessfully tried to change the 50,000-strong rally near the monument to Ivan Franko to their own liking. They failed to harm the proclamation of the Ukrainian Helsinki Union (UHU), which openly declared anti-communist programmatic goals and announced its party

affiliation. The participants of the action raised an unprecedented number of blue-yellow banners and tridents and shouted slogans offensive to the communists: “A communist – on the branch!” (A communist be hanged!), “CPSU – a rabid dog!”, etc. In the nearby Ivan Franko Park, clashes between demonstrators and police officers occurred, which did not always end in favour of the latter. Law enforcement officers forcibly prevented video and photo recording of the events and drowned out the speakers' speeches with the sound of buses and cars equipped with loudspeakers (SALR, f. 359. d. 14, c. 45, pp. 20–21).

However, the “rally marathon” only gained momentum: on July 6, 7, and 16, fifty thousand people demonstrations took place at the “Druzhba” stadium in support of the TUM, UHS, and NRU. On July 21, a gathering was held near the monument to Ivan Franko, at which Bohdan Horyn spoke about the Communist Party’s inability to ensure “glasnost” and “perestroika” (SALR, f. 4. d. 49, c. 99, pp. 1–2). On July 28, August 4, September 1, and October 6, massive rallies in support of the National Revolution took place near Lviv University. The number of protesters reached fifty thousand. On October 23, the demonstration took place near the Officers' House, on November 3, near the Ivan Franko monument, and on December 10, near the Opera and Ballet Theatre. Their leitmotif was the common opinion that the key obstacle to true democratization was the communist party, which was incapable of renewal and therefore must be deprived of power (SALR, f. 4. d. 49, c. 99, pp. 1–2).

The events gained such momentum that in the city centre, at the square where the monument to Taras Shevchenko is, the national centre of anti-communist struggle was established, known as “Klumba” or “Hyde Park”, which the Lviv Communist authorities, despite numerous attempts, failed to destroy in 1988 – 1990. It got to the point that the trade union newspaper “Trud”, according to the first secretary of the city committee, Viktor Volkov, stated the need to introduce martial law in the city (Kliucharov, 1989 p. 3).

In general, in 1988, more than 20 mass actions of civil disobedience took place in Lviv. Some of them were attended by more than 50 thousand residents of the city and region. To suppress the demonstrators, the authorities used more than 10 thousand security forces. They detained 118 people: 59 workers, 21 civil servants, 11 students, 27 unemployed, 1 communist, 15 Komsomol members. Of these, 63 people were administratively punished, 18 people were arrested, 6 people were convicted, 38 people were given preventive measures, and 31 people were fined in the amount of 3,485 rubles (SALR, f. 4. d. 49, c. 99, pp. 2–32).

**Conclusions.** Thus, on the way of Lviv democratic movement of the second half of the 80s of the 20th century into the liberation movement, the local organization of the Taras Shevchenko Ukrainian Language Society played a key role as an “awakener” of national consciousness. It appeared in the labour collectives of Lviv on the basis of self-organized cells that sought to protect the native language and culture from total Russian influence. Thus, the TUM led the general democratic movement from a narrow dissident and youth “informal” environment into the mainstream of a mature patriotic society with distinct state-building features, which later directed the energy of the masses towards the foundation of national political parties.

The process began in a way that was unexpected for the activists – through a spontaneous street demonstration on June 13, 1988 near the Ivan Franko Lviv State University. The main catalyst for the protest was the cynical Communist Party lies and duplicity of the regional committee authorities, who in words demonstrated “perestroika renewal”, but in reality remained a repressive instrument of Moscow’s imperial rule. It was the regime’s attempt to hide the fear of free speech behind “technical reasons” that forced people to take to the

streets. As a result, by June 23, this resistance had turned into a ten-day “rally marathon”, uniting disparate cells into a powerful Lviv organization of the TUM.

Taking advantage of this opportunity, dissidents publicly declared themselves, transforming the little-known Ukrainian Helsinki Group into the Ukrainian Helsinki Union, later the Ukrainian Republican Party. Along with this, during the Lviv “rally marathon” there came realization of the need to found an all-Ukrainian political force – the People’s Movement of Ukraine.

Therefore, the key tools of the unarmed struggle of Lviv residents against the pro-Russian communist regime were not isolated human rights organizations, but mass demonstrations, strikes, and public liturgies of the UGCC, which had emerged from the underground. Such a consolidated position, tempered in the confrontations of the June days of 1988, enabled the Lviv community to be the first in Ukraine to overthrow the communist authorities at the city and regional levels in March 1990 – a year before the restoration of Ukraine’s state independence.

The prospects for further research consist primarily in the need for a detailed study of archival Communist Party records and secret correspondence of the security forces of that time. The study of archival records will enable us to trace at the documentary level how the pro-Russian communist elite, despite its external monolithic nature, felt deep fear of the growing power of Ukrainian patriots and the loss of ideological control.

In general, further analysis should focus on deepening the scientific study of the national-democratic “renaissance” in Lviv at the turn of the 80s and 90s of the 20th century, which logically grew into a state-building movement. In particular, the process of transformation of cultural and educational initiatives into structured political institutions, as well as the influence of the Lviv TUM cell on the consolidation of regional organizations in other regions of Ukraine, requires research. Another important direction is the introduction into scientific circulation of new volumes of oral testimonies and documents from the private archives of direct participants in the events. This will enable us for a more detailed analysis of the mechanisms of dismantling the totalitarian system at the local level and the role of the intellectual elite in shaping the strategy for Ukraine’s exit from the USSR.

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**EUROPEAN PROGRAMS FOR MILITARY HELICOPTERS CREATION  
AT THE END OF THE 20th – THE BEGINNING OF THE 21st CENTURIES  
AND THEIR ROLE IN RENEWAL OF ARMY AVIATION**

**Abstract.** *The purpose of the research* is to analyze the international European programs fulfillment for new military helicopters creation, starting from the 80s of the 20th century. Additionally, importance of these programs for army aviation re-equipment of leading NATO countries as Germany, France, Italy and Spain, has been also defined. **The methodology of the research** was meant to utilize a chain of general scientific and special historical principles. There is analysis and synthesis that should be brought to attention among general scientific principles. Among the special methods, the focus should be on historical systematic and typological methods. **The scientific novelty of the research** consists in the fact that, for the first time in the Ukrainian historiography, it examines the main programs for the creation of military helicopters in Western Europe and their significance for the rearmament of the army aviation of NATO countries. **Conclusion.** During the last quarter of the 20th – the beginning of the 21st century, two international programs were fulfilled on helicopters creation for army aviation in Western Europe, namely – attack helicopter Tiger (French-German one) and a medium transport TTH (the last is a part of broader program NH 90 that is put into action by France, Germany, Italy, Spain and the Netherlands).

Though the process of new helicopters creation became prolonged in time – they were 10 or more years behind the deadline. That was the cause, first, by the end of the Cold War, that resulted in decreasing military expanses and the need to amend projects to adjust to new conditions of combat actions. Decrease in army and military expenses influenced the program capacities. For instance, the quantity of the helicopter Tiger production was twice less than planned at the beginning – this is including export to countries which are not program participants.

Fulfillment of programs under the research had a hidden meaning for army aviation re-equipment of the leading Western European countries. It is typically of Germany, where Tiger and TTH became almost the only samples of helicopters in army aviation units in the first line. France and Spain finished the process of re-equipment the units with Tiger helicopters. Though there were too few helicopters TTH ordered due to financial restrictions. That prevented from modernizing the whole helicopter pool. It is typical of Spain that had to extend in time the procurement of helicopters due to financial issues. Procurement of TTH in Italy enabled to re-equip transport helicopter units partially.

In general, the two examined Programs became of significant experience in mutual design of innovation assets for aviation manufactory and influenced further integration of European helicopter industry.

**Key words:** combat helicopter, transport helicopter, army aviation, aviation industry, NATO, Cold War.

## ЄВРОПЕЙСЬКІ ПРОГРАМИ СТВОРЕННЯ ВІЙСЬКОВИХ ГЕЛІКОПТЕРІВ КІНЦЯ ХХ – ПОЧАТКУ ХХІ ст. ТА ЇХ ЗНАЧЕННЯ ДЛЯ ОНОВЛЕННЯ ПАРКУ АРМІЙСЬКОЇ АВІАЦІЇ

*Анотація. Мета дослідження* полягає в аналізі ходу реалізації міжнародних європейських програм створення військових гелікоптерів починаючи з 80-х рр. ХХ ст. Також визначене значення цих програм для переозброєння армійської авіації провідних європейських країн НАТО – Німеччини, Франції, Італії та Іспанії. *Методологія дослідження* передбачала застосування низки загальнонаукових та спеціальних історичних принципів. Серед загальнонаукових методів треба згадати аналіз і синтез. Зі спеціальних методів відзначимо порівняльний і проблемно-хронологічний. *Наукова новизна дослідження* полягає в тому, що у ньому вперше в українській історіографії в історичному контексті розглянуті основні програми створення військових гелікоптерів в Західній Європі та досліджене їхнє значення для переозброєння армійської авіації країн НАТО. Упродовж останньої чверті ХХ – початку ХХІ ст. в Західній Європі реалізовані дві міжнародні програми створення гелікоптерів для армійської авіації – бойового Tiger (франко-німецька) і середнього транспортного ТТН (остання – частина ширшої програми NH 90, яка реалізується Францією, Німеччиною, Італією, Іспанією та Нідерландами). Однак процес створення нових гелікоптерів дуже затягнувся – відставання від прогнозованих термінів склало десять і більше років. Зумовлене це насамперед завершенням холодної війни, наслідком чого стало скорочення військових витрат і необхідність коригування проєктів для пристосування до нових умов ведення бойових дій. Скорочення армій і військових витрат відобразилось і на обсягах програм. Наприклад, гелікоптерів Tiger в кінцевому підсумку виготовили удвічі менше, ніж планувалось на момент початку програми – і це з урахуванням експорту до країн, які не є учасниками програми. Реалізація досліджених програм мала засадничі значення для переозброєння армійської авіації провідних західноєвропейських країн. Насамперед це характерно для Німеччини, де Tiger і ТТН стали практично єдиними типами гелікоптерів у частинах армійської авіації першої лінії. У Франції та Іспанії процес переозброєння підрозділів гелікоптерами Tiger вже завершився. Однак гелікоптерів ТТН з огляду на фінансові обмеження замовили надто мало. Це не давало змоги повністю оновити парк транспортних гелікоптерів. Особливо це характерно для Іспанії, яка змушена була через фінансові проблеми дуже розтягнути в часі закупівлю нових гелікоптерів. В Італії теж закупівлі ТТН дозволили тільки частково переозброїти підрозділи транспортних гелікоптерів. Назагал дві проаналізовані нами програми стали масштабним досвідом реалізації спільної розробки інноваційних виробів авіаційної промисловості і сприяли подальшій інтеграції європейського гелікоптеробудування.

*Ключові слова:* бойовий гелікоптер, транспортний гелікоптер, армійська авіація, авіаційна промисловість, НАТО, холодна війна.

**Problem Statement.** Aviation industry is one of the most technologically complicated field in industry. It requires huge investments, meaning not only financial but also intellectual. Technical progress of the second half of the 20th century led to more complicated aviation samples creation. Their design and manufacturing were far beyond the capabilities of companies and countries. This obstacle pushed them to unite efforts of plane and helicopter designers. Therefore, international cooperation in helicopter development became a key factor in reducing costs and technological risks (Humphrey, 1995; Droff, 2017).

The first successful attempt of mutual helicopter manufacturing was realized far in the 1960s, that was French-British Program for three types of helicopters creation. Though it was difficult to name it as a complete development: French Sud Aviation company (later assimilated in Aerospatiale) and the British Westland Company just simply divided the responsibilities. The first one was responsible for the light helicopter Gazelle production and the heavy one – Puma, while the second one was responsible for the medium helicopter Lynx. Later all three helicopters were integrated into units in France and the United Kingdom, and

were exported widely. Then the British Company Westland and Italian Company Agusta mutually put into action the program for heavy helicopter EH 101 (AW 101) production. But it remained to be a niche product not being widely spread.

Two mutual programs for helicopters production, initiated in 1980, played a vital role in integration for Western Europe aviation industry and re-equipment of NATO helicopters' pool. One of them was multilateral and implied a mid-multifunctional helicopter NH 90 production. The second of the two programs, French-German bilateral program, led to fire support helicopter Tiger creation. These two programs are of great importance not only in technical aspects, but in efforts unity in order to create new, lading samples of aviation assets. They both led to re-equipment of army aviation of leading countries in Western Europe. That is why, it makes the research of great interest not only for history of vehicles but for military history as well.

**Review of Sources and Recent Researches.** Two main groups of sources have been used in this research. The first of them is about the history of how the programs for helicopter production were put into force. These are the works of G. Chambost and K. G. Benz (Chambost, & Benz, 1984), O. Geissinger and S. Traldi (Geissinger, & Traldi, 1997), G. Humphrey (Humphrey, 1995), etc. The work of J. Droff should be singled out, that is dedicated to integration processes in European helicopter industry (Droff, 2017). The second group consists of works dedicated to the history of helicopters implementation and manning the units and their place in the place of army aviation (Grolleau, 2022; Kwasek, 2020; Wieliczko, 2021 etc.). By utilizing these both approaches we have been able to view the issues of the research from the wider perspective.

To achieve the goal of this research we have used a bunch of research methods. There is analysis and synthesis that should be brought to attention among general scientific principles. There is comparative and problem-chronological among special methods to be used.

**The purpose of the article** is to study the way the program for NH 90 and Tiger helicopters were fulfilled, identify issues and achievements, as well as to analyze their influence on army aviation assets and tactics modernization.

**Research Results.** In 1970 light assets, designed on the platform of multifunctional helicopters, were the main combat helicopters in European NATO countries. Typical assets were MBB Bö-105P (Germany) and Aerospatiale SA342L Gazelle (France). They were characterized by low survivability (due to the absence of armored protection) and weak armament (4-6 anti-tank guided missiles) that could be fired at enemies' tanks only. The first attempt to create an improved helicopter was done by European engineers in the mid of 1970<sup>th</sup>. That was owing to cooperation of the two companies – German VFW-Fokker and the British Westland – a new project for helicopter P277 appeared that looked much alike US Bell AH-1G. But the project was not put in action (Fischer, 2005, p. 25). Cooperation of German manufacturers with French one turned to be more effective. Both Germany and France had similar requirements for combat helicopters, designed to be used in the European theatre of operation: their primarily designation had to be to destroy the Soviet tanks with the help of long-range antitank guided missiles. However, France took part in numerous conflicts of low intensity (mainly in the territories of its former African colonies). For such operation they required a helicopter with not such sophisticated, but more ordinary armament – automatic gun and non-guided missiles. Thus, there were reasons for creation of unified helicopters with similar power unit, main and steering rotor, fuselage, but with different targeting assets and armament. This concept was the bulk for the new German-French combat helicopter production.

In 1984 the German company Messerschmitt-Bölkow-Blohm (MBB) and the French company Aerospatiale established a consortium Eurocopter, designated for new helicopters creation. A subsidiary company Eurocopter Tiger, established on September 18 1985, was responsible for the design of a new helicopter. It should be said that the engine MTR 390 for a new helicopter was produced together with a German company MTU, the French company Turbomeca and the British company Rolls Royce (Humphrey, 1995, p. 6).

Consortium of French, the British and German companies dealt with anti-tank guided missiles TRIGAT creation (Kwasek, 2020, pp. 50–51).

The final concept of a helicopter named Tiger was framed in 1987 (Humphrey, 1995, p. 5). According to it, there were three versions:

- UHU (Unterstützungshubschrauber) – antitank for Bundeswehr;
- HAC (Hélicoptère Anti Char) – antitank for French Army;
- HAP (Hélicoptère d’Appui Protection) – fire support helicopter for French Army.

The helicopter Tiger is built according to its classical for combat helicopter scheme – with one main rotor, two-seated, with crew tandem. Power unit – two turboshaft engines. Kevlar and carbon fibers are used in the fuselage construction, but wings of main rotor are made of composite materials. That enabled not only to decrease the helicopter weight, but also decrease its detection by radars. Modern on-board equipment supports helicopter combat usage in the daylight and at night. Main differences between samples of Tigers were in armament and the place of sight head. These are highlighted in Table 1 (as of the beginning the designing process; during the designing stage they were partially amended) (Fiszer, 2005, pp. 26–27).

Table 1

**Main differences of helicopter Tiger versions**

<b>Sample</b>	<b>UHU</b>	<b>HAC</b>	<b>HAP</b>
Sight head placement	over the hub of main rotor	over the hub of main rotor	over the cabin
Gun	-	-	30-MM 30M791
Anti-tank guided missile	TRIGAT LR, HOT-3	TRIGAT LR, HOT-3	-
Guided missile, class «air-air»	-	-	Mistral
Non-guided missiles	-	68-MM SNEB	68-MM SNEB

Germany planned to procure 212 UHU helicopters, but France – 140 HAC and 75 HAP. Thus the total need for the army of both countries was 427 helicopters. At the early stage of Tiger program fulfillment, it was planned that HAP sample will be in service in 1991, UHU – at the end of 1992, and HAC in 1995 (Chambost, & Benz, 1984, p. 575).

In reality the deadlines were not met. Some of the reasons were – time consuming approval of the details in the program by participants, as well as the end of the Cold War that led to decrease in defence budget and the necessity to revise a series of helicopter characteristics. After the collapse of the Warsaw Pact Organization and the demise of the Soviet Union, Bundeswehr had no real need in narrow-specified anti-tank helicopter. Instead a general-purpose helicopter was in need, capable of taking part in peacekeeping operations and low-intensity conflicts. Thus, UHU was modified into UHT (Unterstützungshubschrauber Tiger). Its armament was improved, having included guided missile Stinger of class “air-air”, 70mm non-guided missiles and overhead containers with 12.7mm machine guns (Fiszer, 2005, p. 27).

The French sample HAC was modified in 2001, from a simple anti-tank version it became a multifunctional HAD (Hélicoptère d'Appui Destruction). From its armament perspective, it was similar to HAP modification, but its engines are 14% more powerful. Owing to this, HAD is better to be used under hot climate conditions.

Despite on-board gun, non-guided missiles and Mistral missile (class "air-air"), HAD is equipped with anti-tank guided missiles – US AGM-114 Hellfire II (French Army helicopters) or Israel Spike ER (helicopters exported to Spain), (Kwasek, 2018, pp. 57–58). Another sample was Tiger ARH (Armed Reconnaissance Helicopter), ordered by Australia. It was equipped with anti-tank guided missiles AGM-114 Hellfire II, guided missiles of class "air-air" FIM-92 Stinger and 70mm non-guided missiles (Gordon, 2014, p. 82).

First prototype of Tiger made its first flight on April 27 1991. In total 7 samples were produced, two out of them were designated for ground static testing. The first serial helicopter of HAP version was ready in December 2000, but in version UHT – in August 2002 (Fiszer, 2005, pp. 28–29). Thus, they were behind the deadline for 10 years. In addition, first serial helicopters were used for testing continuation. The French and German Army Aviation submitted them only in spring 2005. Helicopters Tiger was manufactured at the factories in Marignane (France) and Donauwörth (Germany).

The restructuring of the European defense industry has significantly influenced the formation of multinational helicopter programs such as Tiger (Mawdsley, & Brzoska, 2004). In 2002 German government decreased the number of Tiger helicopters, being supposed to purchase, from 212 pcs to 110 pcs, later on – up to 80 pcs, and finally, up to 68 pcs. Though the mentioned above quantity occurred to be excessive and in 2013 UHT pool was decided to maintain with 57 samples (68 were manufactured, but 11 were immediately sent to the warehouse). The process of production and putting helicopters into service turned to be prolonged in time: the latest serial UHT was produced only in August 2018. So it took 16 years to produce 68 helicopters. UHT achieved their combat readiness in June 2010, but in March 2013 Bundeswehr had only 18 combat efficient helicopters of such type, and 9 more helicopters were used for training and testing purposes (Kwasek, 2020, pp. 53–54).

Alike reduction occurred in the French portion of the Program. The first contract, signed in June 1999, meant to supply 80 helicopters (70 HAP and 10 HAC) with the perspective to increase that number to 120 pcs (80 and 40 consequently). In December 2005 the order was revised – that included 60 helicopters (40 HAP and 20 HAD). In 2015 11 additional HAD samples were ordered and made a decision to modernize 36 HAP helicopters to this standard. 40 HAP pcs were delivered in 2005 – 2012, but the supply of 31 HAD helicopters happened within 2012 – 2020. So the average tempo of the French Tiger helicopters supply was not higher than the German ones. Modernization of HAP helicopters to HAD standard ended in 2023. After that French army aviation would have the unified pool of combat helicopter (Kwasek, 2020, pp. 50–52).

Beside France and Germany, Tiger helicopters were sold to two other countries. In 2004 – 2010 Australian Army got 22 samples in ARH version (Gordon, 2014, p. 80). In 2007 – 2020 Spain received 24 helicopters. Those samples were built at the Spanish factory of Eurocopter concern in Albacete. Six out of them were of HAP-E version, and 18 – of HAD-E version. As it was with French samples, owing to modernization of HAP-E helicopters, all Spanish Tigers were brought to one standard (Huertas, 2018, pp. 94–95). There were new orders then. Thus the Program for creation and manufacturing of combat Tiger helicopters ended after having produced 205 serial samples. It took almost 20 years. Anyway to put

helicopters into service took a lot of time – for example, in 2016 there were only 97 samples of this type in service in all four countries (Droff, 2017, p. 22).

Another international European Program was released simultaneously with combat helicopter Tiger creation that assumed creation of a multipurpose middle class helicopter. In Army Aviation of NATO countries and Air Forces it had to substitute Bell UH-1 helicopter (and its licensed versions) and Aerospatiale SA330; in Naval Aviation – Lynx and Sea King. The NH90 program became the first European helicopter project designed simultaneously for land and naval forces (Geissinger & Traldi, 1997). With this purpose it was meant to create two subtypes of helicopters – Tactical Transport Helicopter (TTH) and Navy NFH (NATO Frigate Helicopter). Both subtypes had 75% identical construction. Main differences were in composition of board assets and armament, as well as NFH adjustment for stationing on combat vessels. In contrast to bilateral Tiger Program, NATO Helicopter Program for the 1990s (abbreviated NH 90) was multilateral – first France, Germany, the United Kingdom, Italy and the Netherlands took part. That caused difficulties in approving requirements of various countries and led to program delay even at the very first stage of its implementation. First edition of requirement for NH 90 was prepared in 1984 and its final edition – only in 1992. In 1987 due to different perspectives with other participants, the UK left the Program. Finally, on August 13 1992 a consortium NHIndustries was established as a part of companies Eurocopter France, Eurocopter Deutschland, Agusta (Italy) and Fokker (the Netherlands) (Geissinger, & Traldi, 1997, pp. 160–163). On September 1 1992 the consortium received a contract for first helicopters supply. That time it was supposed to procure 716 helicopters: 210 pcs for France (150 TTH and 60 NFH), 272 pcs for Germany (234 TTH and 38 NFH), 214 pcs for Italy (150 TTH and 64 NFH) and 20 pcs for the Netherlands (all of NFH type) (Fischer, & Gruszczyński, 2017, p. 45).

A combination of technical innovations were put into NH90 helicopter construction, the main of which was control system fly-by-wire. Its application allowed decreasing weight and increasing helicopter reliability. NH90 became the first serial helicopter in the world, being equipped with such system. Avionics had an open architecture and it allowed integrating new components into its structure. In TTH it might be thermal vision station FLIR and night vision goggles. NH90 was built according to a classical single screwed scheme and equipped with two engines. In contrast to Tiger, two alternative versions of power installation were foreseen: engine RTM 322 (mutual development of Rolls Royce and Turbomeca) or US General Electric CT7. Helicopter's fuselage was totally of composite materials, metals (aluminum alloy and titanium) applied only in the most loaded units (Rusiecki, 2006, pp. 30–31).

The first out of 5 NH90 prototypes made its first flight on December 18 1995, the others were tested in 1997 – 1999. The main problem was testing of fly-by-wire system. The first flight of the prototype with full-fledged functional system was only on December 12 2003. That allowed to launch production of serial helicopters, first of which was ready in May 2004 (Rusiecki, 2006, p. 29). Thus almost 12 years passed from the moment of NHIndustries consortium creation till the beginning of NH90 serial production.

NH90 production is happening at four main lines of consortium partners: already mentioned Marignane (France), Donauwörth (Germany), Albacete (Spain), as well as at a plant in Tessera (Italy). Moreover, helicopters, ordered by Australia, were constructed in Brisbane (Fischer, & Gruszczyński, 2017, p. 44). Finland, Sweden and Norway decided to mutually purchase NH90 helicopters in order to save money (Lehtonen, & Isojärvi, 2016, p. 13). The factory Halli (Finland) fulfilled their order.

In this survey we will confine to analysis of production and supply of TTH helicopters for leading European countries. Exports of NH90 beyond consortium members can be a topic for a separate survey, taking into account its complexity and versatility. In 2000 Germany ordered 80 TTH helicopters and in 2007 increased the capacity up to 122 helicopters, but in 2013 decreased it to 82 pcs. First serial helicopter was produced in May 2014, though combat parts to TTH arrived only in June 2011. All ordered helicopters were fully supplied only in 2021 (Wieliczko, 2021, p. 37). Both Italy and Germany simultaneously ordered 60 TTH that received UH-90A marking. The first helicopter was ready in 2004 but the customer got it only at the end of 2007. The first helicopters were supplied not in full equipment, and only starting from 2013 (from the 22<sup>nd</sup> sample) they were delivered fully equipped.

France ordered the first shipment for its army aviation in November 2007 and it consisted of 12 TTH. Next contracts, signed in 2008, 2013 and 2015 consisted of 74 pcs in total. First French TTH was ready in December 2010 and handed to the army after a year long testing – in January 2012. Last 10 helicopters will be handed to the customer only in 2025 – 2026. It means that it will take 16 years to produce 74 helicopters (Wieliczko, 2021, p. 33).

The fourth main European customer – Spain – has bought the least number of TTH. In December 2006 a contract for 45 such helicopters was signed (38 for the Army and 7 for the Air Forces), but due to the economic crisis in 2013 that number became twice less – to 22 pcs (16 for the Army and 6 for the Air Forces). The first helicopter was ready in December 2010, and the whole program was finished in 2021, so the average tempo of supply was 2 helicopters a year. In January 2019 a second order was made for helicopters for Spain – 23 helicopters, but only ten out of all were designated for the Army Aviation, and six more for the Air Forces and seven for Navy (Wieliczko, 2021, pp. 34–35).

Mutual helicopter programs allowed renewing the Army Aviation pool of four leading European NATO countries – Germany, France, Italy and Spain. They were characterized by complex coordination mechanisms and political compromises, which often led to delays and cost overruns (Hartley, 2008). All of them received TTH in service, and three out of four – attack helicopters Tiger. Italy was an exception in the last case as it produced its own combat helicopter A129 Mangusta and put it into service. In 1990 – 1996 the Italian Army received 60 pcs (Kharuk, 2016, p. 35).

The most valuable realization of mutual programs was for Germany. As of 2021 all of its three Army Aviation units – Transport Helicopters Regiments 10 and 30 and Combat Helicopters Regiment 36 – were completely re-equipped by new types of assets. They comprised 51 helicopters Tiger and 82 TTH. 33 light helicopters of other types were used for training purposes and as additional assets (Fischer, & Gruszczyński, 2021a, p. 52). Having modern assets with high tactical technical characteristics allowed to broaden Bundeswehr Army Aviation participation in abroad missions. From 2013 Tiger and TTH helicopters took part in NATO operations in Afghanistan, and starting from 2017 – in missions in Mali.

Supply of Tiger and TTH helicopters to French Army Aviation are estimated by experts as a part of “digital revolution”, meant to adjust this Army branch to network-centric warfare. Though the tempo of re-equipment falls beyond German one. As of 2021 Combat Helicopter Regiments 1 and 5 were re-equipped (each had two Tiger squadrons and two TTH squadrons). Regiment 3 has just started to receive TTH, and its re-equipment will end only in 2025. Even after this process, French Army Aviation will presume transport helicopters Caracal, Cougar and several Pumas in service (the last ones for interaction with anti-terroristic units) (Grolleau, 2022, pp. 82–83).

In Italian Army there are new UH-90A helicopters (alongside with A129) in Army Aviation Regiments 5 and 8. Simultaneously Regiments 2 and 4 continue using old helicopters like AB205, AB212 and AB412 as the quantity of purchased UH-90A helicopters is not enough for its re-equipment (Fischer, & Gruszczyński, 2021b, pp. 55–56). The case is worse in Spain. Its Army Aviation Tiger helicopters supply enabled to completely substituting old samples Bö-105. Though TTH was of sufficient quantity to re-equip only one out of four medium-class transport helicopters battalion – others are still using old assets (Finati, & Rollino, 2021, p. 36).

**Conclusions.** During the last quarter of the 20th – the beginning of the 21st centuries two wide-scale international programs were fulfilled in Western Europe with the purpose to create helicopters for Army Aviation – combat Tiger and mid transport helicopter TTH (the last one is a part of a broader NH90 program). Both of them had series of common characteristics:

- desire to put the most recent and innovative achievements of aviation technologies into helicopters' construction (wide use of composite materials, new highly effective engines etc);
- series of revolutionary decisions in on-board electronics (avionics with open architecture, adjustment to actions in network-centric warfare);
- delay in meeting deadlines (fall beyond the initially set dates for ten years or more);
- low tempo of helicopters supply (in average from two to five assets a year per one country);

Delay in the tempo of helicopter program fulfillment was caused by several factors. One of them was the necessity to coordinate requirement for future helicopters between several participating countries within the program. The other was the end of the Cold War that led to decrease in financial expenses for defence budgets and another revision of requirement on order to adjust to new combat environment. Reduction of armies and military expenses influenced several parameters. For instance, the quantity Tiger helicopters produced was twice less than it was planned at the early stage of the program (even paying attention to expertise contracts for countries that did not participate in the program).

Visible technical innovations put into Tiger helicopters and TTH allowed naming them as assets of new generation. Realization of mentioned programs was a bulk for re-equipment of Army Aviation in leading Western European countries. It was fully fulfilled in Germany where Tiger and TTH became the only types of helicopters of the first line in army aviation units. In France and Spain the process of units' re-equipment with Tiger helicopters ended, but provision of TTH in contracted amounts did not allow to fully renovating transport helicopters pool. In particular it is peculiar for Spain which had to extend in time procurement of new helicopters due to financial issues. In Italy TTH procurement only partially allowed to re-equip transport helicopters units.

Provision of new generation helicopters allowed the countries which utilize them to widen Army Aviation participation in operations abroad, including peacekeeping operations. Though analysis of such participation is far beyond the frame of this article and requires further surveys.

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**TRANSFORMATION OF HISTORIOGRAPHICAL AND METHODOLOGICAL UNDERSTANDING OF THE UKRAINIAN VILLAGE (THE SECOND HALF OF THE 20th – THE BEGINNING OF THE 21st CENTURY): CONCEPTUAL PRINCIPLES AND STAGES OF DEVELOPMENT**

**Abstract.** *The research is devoted to a systematic study on the historiographical and methodological genesis of the scientific thought about the Ukrainian village and the agrarian relations from the 1950s to the beginning of the third decade of the 21st century. The purpose of the research is to carry out a comprehensive analysis regarding the transformation of conceptual foundations and stages of the historiographical and methodological understanding of the Ukrainian village in the second half of*

the 20th – at the beginning of the 21st centuries, as well as identifying the vector of the research guidelines development from the classical Soviet approaches to modern practices of historical science. **The methodology of the research** is based on the principles of historicism, scientificity, verification, authorial objectivity, the use of the historical, institutional, systemic and problem chronological method, as well as methods of comparative judgment and generalisation. **Scientific novelty.** There have been clearly distinguished and substantiated three qualitatively different stages of the historiographical and methodological understanding of the topic: the Soviet one, which was characterised by ideologization and adherence to the Marxist-Leninist formational approach, the transitional one with its inherent de-ideologization and nation-oriented approach, and the modern one, characterised by the methodological pluralism, interdisciplinarity, and synergy. **Conclusions.** The transformation of the historiographical understanding of the Ukrainian village during the mid-20th –the beginning of the 21st centuries went from an ideologised formational paradigm to a human-centered and interdisciplinary strategy for studying this cradle of the Ukrainian history. This process was implemented through three consecutive stages, each of which is characterized by a radical change in methodological tools and a significant expansion of the intellectual horizons of researchers. The first stage was the Soviet one, which is known as the period when historiography was methodologically limited and distorted. The agrarian historians focused exclusively on the “success” of the collective farm and the state farm system (growth in production, mechanization, “the rapprochement of the city and the countryside”), completely ignoring the tragedies that befell the Ukrainian countryside during the 20th century. The above-mentioned led to the creation of an ideologically biased image of the countryside, which violated one of the most important methods of historical research – the method of objectivism. The second stage was a transitional one, during which a historiographical and methodological break occurred. In the late 1980s – early 1990s, due to the works written by L. Berenstein, S. Kulchytsky, P. Panchenko and other agrarian historians, the processes of de-ideologization and destruction of the Soviet myths have been initiated. The main emphasis was shifted to criticism of the collective farm system and rethinking the tragedies of the Ukrainian peasantry. The third stage was the modern one, which was characterized by methodological pluralism and interdisciplinarity. The main focus was on the human dimension of the transformational changes, the mentality of the peasantry, environmental factors and cultural transformations in the research and is becoming more relevant. The modern historical school seeks to implement global trends to move from a limited abstract description of facts to a thorough understanding of the role of the peasantry as an important component of the Ukrainian nation in modernization projects.

**Key words:** historiography, methodology, agrarian history, peasantry, interdisciplinary approach, synergy.

## ТРАНСФОРМАЦІЯ ІСТОРІОГРАФІЧНО-МЕТОДОЛОГІЧНОГО ОСМИСЛЕННЯ УКРАЇНСЬКОГО СЕЛА (ДРУГА ПОЛОВИНА ХХ – ПОЧАТОК ХХІ СТОЛІТТЯ): КОНЦЕПТУАЛЬНІ ЗАСАДИ ТА ЕТАПИ РОЗВИТКУ

**Анотація.** Роботу присвячено системному дослідженню історіографічно-методологічної генези наукової думки про українське село та аграрні відносини починаючи з 1950-х рр. до початку третього десятиліття ХХІ ст. **Метою дослідження** є комплексний аналіз трансформації концептуальних засад та етапів історіографічно-методологічного осмислення українського села у другій половині ХХ – на початку ХХІ ст., а також виявлення вектору розвитку дослідницьких орієнтирів від класичних радянських підходів до сучасних практик історичної науки. **Методологія дослідження** спирається на принципи історизму, науковості, верифікації, авторської об'єктивності, на використання історичного, інституційного, системного та проблемно-хронологічного методу, а також методів порівняльного судження і узагальнювального умовиводу. **Наукова новизна.** У дослідженні здійснено чітке розмежування та обґрунтування трьох якісно відмінних етапів історіографічно-методологічного осмислення теми: радянського, що характеризується ідеологізацією та дотриманням марксистсько-ленінського формалізованого підходу, перехідного з притаманними йому деідеологізацією і національно орієнтованим підходом, а також сучасного, для якого характерними стали методологічний плюралізм, міждисциплінарність та синергетика. **Висновки.** Трансформація

історіографічного осмислення українського села протягом середини XX – початку XXI ст. пройшла шлях від ідеологізованої формаційної парадигми до людиноцентричної та міждисциплінарної стратегії вивчення цієї коліски української історії. Означений процес реалізувався через три послідовні етапи, кожен з яких характеризується докорінною зміною методологічного інструментарію та суттєвим розширенням інтелектуальних горизонтів дослідників. Перший етап – радянський, який відомий як період, коли історіописання було методологічно обмеженим і викривленим. Історики-аграрники зосереджувалися єдино на «успіхах» колгоспно-радгоспної системи (зростання виробництва, механізація, «зближення міста і села»), повністю замовчуючи трагедії, які спіткали українське село протягом XX ст. Це призвело до створення ідеологічно заангажованого образу села, що порушувало один із найголовніших методів дослідження історії – метод об'єктивізму. Другий етап – перехідний, під час якого відбувся історіографічно-методичний злам. У кінці 1980 – на початку 1990-х рр. завдяки роботам Л. Беренштейна, С. Кульчицького, П. Панченка та інших істориків-аграрників, започатковано процеси деідеологізації та руйнування радянських міфів. Головний акцент було зміщено на критику колгоспної системи та переосмислення трагедій українського селянства. Третій етап – сучасний, який характеризується методологічним плюралізмом та міждисциплінарністю. Сьогодні актуалізуються дослідження, сфокусовані на людському вимірі трансформаційних змін, менталітеті селянства, екологічних чинниках та культурних перетвореннях. Сучасна історична школа прагне впровадити світові тенденції, щоб перейти від обмеженого реферативного опису фактів до ґрунтового осмислення ролі селянства як важливого компонента української нації у модернізаційних проектах.

**Ключові слова:** історіографія, методика, аграрна історія, селянство, міждисциплінарний підхід, синергетика.

**Problem Statement.** Due to a continuous development of historiographic science, it was possible for modern scholars to rethink and refine previous historical narratives, involve new methodological approaches and expand the source base to create a more complete, objective and multifaceted understanding of the past.

One of the relevant topics for the research of the Ukrainian historians is the one related to the Ukrainian village, the bearer of the national identity and culture and the fundamental basis for the formation of an agrarian civilization. Given this fact, the analysis of historiographic studies of the Ukrainian village, starting from the mid-twentieth century and ending with the present, is quite relevant for the historical science.

It was during this historical period that the evolution of methodological features and a radical renewal of conceptual approaches, which were aimed at studying the countryside, took place. The Ukrainian historians have gone from Marxism-Leninism to the latest historiographic practices based on the theoretical and methodological principles using an interdisciplinary approach that synthesizes the achievements of many sciences into one fundamental study.

The relevance of the study is also due to the need for a comprehensive understanding of the historiographical and methodological path of studying the Ukrainian village, which during the second half of the 20th – first third of the 21st century went through three radically different scientific and methodological paradigms: Soviet, transitional and independent modern.

The main problem of the study is to trace and analyze the evolution of the Ukrainian historians' views, which reflects the transition: from the ideological determinism (Marxist-Leninist formational approach, keeping in silence tragedies, and idealization of the collective farm system) to pluralism of the methodologies (human centric, synergistic, and civilizational approaches).

Hence, the scientific understanding of the topic is relevant, since it not only summarizes the research achievements for the specified period, but also contributes to the formation of objective historical knowledge necessary for the national self-awareness and solving modern socio-economic issues.

**Review of Recent Research and Publications.** It should be noted, first of all, the collective work of modern domestic scholars edited by Valery Smolii “History, Methodology and Source Base of the Research on the Agrarian Relations in Ukraine in the Second Half of the 20th century” (Smolii, 2006), while analyzing historiographical investigations aimed at revealing the topic. The authors applied a comprehensive and thorough methodological basis to analyze critically existing publications on socio-political, socio-economic and cultural processes in the Ukrainian village in the second half of the 20th century. There were the following historians, who covered certain aspects of the mentioned topic in the studies as S. Kornovenko, A. Morozov (Kornovenko, & Morozov, 2023), V. Ilnytskyi, V. Starka (Ilnytskyi, & Starka, 2024), Yu. Prysyzhnyuk (Prysyzhnyuk, 2021), Ya. Fedorenko (Fedorenko, 2018) and the others. Due to the multifaceted nature of the issue associated with the evolution of the historiographical and methodological understanding of the Ukrainian village, it was possible to continue research by applying the latest methodological approaches, revealing the topic in a new way.

**The purpose** of the research is to carry out a comprehensive analysis of the transformation of the conceptual foundations and stages of the historiographical and methodological understanding of the Ukrainian village in the second half of the 20th – at the beginning of the 21st centuries, as well as identifying the vector of the research guidelines development from the classical Soviet approaches to modern practices of historical science.

**Research Results.** The approaches based on the Marxist-Leninist methodology of scientific knowledge prevailed in domestic historiographic science almost the entire second half of the 20th century. That is why, the majority of scholars of that time remained silent about the tragedies that befell the Ukrainian village during the period when the country was part of the Soviet Union and were a kind of taboo for the scholars’ research. First of all, these are problematic issues related to the Holodomor of 1932 – 1933, the Soviet repressive policies and forced resettlement of the Ukrainian peasants, etc. Ideologically distorting the history of the village, the scholars often analyzed statistical data, which, in their opinion, were convincing evidence of the successes of the Soviet government in matters related to the processes of collectivization, focusing their attention primarily on improving the living standards of peasants and success in the field of cultural construction, education, etc.

However, despite this fact, in the second half of the 20th century, there were published several fundamental works, either exclusively devoted to the rural areas of Ukraine, or included in the broader context of the history of the Ukrainian SSR. Hence, the first attempt to create a generalizing study on the history of the peasantry of Ukraine was the two-volume work “History of the Peasantry of the Ukrainian SSR” (Dyadychenko, et al, 1967). It was published by a team of talented historians of the Institute of History of the Academy of Sciences of the Ukrainian SSR, under the leadership of the Editorial Board, which consisted of V. Dyadychenko, M. Braichevsky, M. Leshchepko, and K. Stetsiuk in 1967. The first volume of this work dealt with the history of the rural areas, starting from the period of Rus’ State and up to 1917, and the second, respectively, 1917 – 1966.

The basis of this study, when analyzing the transformations of the socio-economic relations that determined the dynamics of a rural development during each historical

period, was the formational approach that formed the basis of Marxist-Leninist theory. The authors of the publication, used diverse ideological clichés and considered the history of the Ukrainian peasantry exclusively in the context of the regional interaction with the agrarian communities of Russia and Belarus, emphasizing the commonality of their socio-economic experience, while ignoring the role of the national factor. There were also covered numerous aspects of the development of the Ukrainian village during the period under study in the 8-volume fundamental publication “History of the Ukrainian SSR” (Kondufor, 1979), which was published in the 70s of the 20th century. There were included the following scholars in the Editorial Board: I. Artemenko, V. Baran, S. Bibikov, V. Dovzhenok and the others. There was numerous data on the changes that occurred in the socio-economic, cultural and spiritual life and everyday life of the Ukrainian peasantry in the publication, among a large array of the factual material. However, despite the large array of the factual material, its presentation also had significant shortcomings that were characteristic of the entire historiography of the Soviet period. It should be noted the following as the main ones. There was the complete leveling of the national factor (all achievements of the communist system were presented as the result of the work of the Soviet people, and not as an independent contribution of the Ukrainians) if to compare with the previous work. According to L. Lanoviuk, there were too many harmful official ideologemes about the negative role of the village in the Soviet historiography (Lanoviuk, 2018, p. 160). The other ones were the lack of objective analysis regarding various statistical data and the actual selection of material (only those data that served as confirmation of the advantages of the communist system in the life of the Soviet society were used). Therefore, we can conclude that although this publication is certainly an extremely important source of data for studying the history of the Ukrainian village, its use currently requires modern methodological interpretation and critical rethinking of the material outside the framework of the Soviet paradigm.

The end of the 1980s was marked by changes in the life of society, which opened the way for a critical rethinking of history, a partial weakening of total control and censorship, and initiated processes that led to the national revival and, ultimately, contributed to the collapse of the Soviet Union. A cardinal break occurred in the Ukrainian historical school of that time, which marked its transition from the tightly controlled the Soviet doctrine to a critical, pluralistic, and nationally oriented approach. The scientific monographs of that time were considered to be the proof. In particular, the national factor was gradually being involved in the consideration of the historical processes, and the research was acquiring human-centric features. In particular, the monograph, written by P. Panchenko and V. Chyshko was published in the late 1980s (Panchenko, & Chyshko, 1989), which characterized the path of the Ukrainian village to the scientific and technological progress during the 1960s – 1980s. The authors paid special attention to the training of the national qualified agricultural personnel as a necessary condition for the intensification of the agricultural production.

Hence, due to the analysis on the historiographic sources of the 1960s – 1980s, it was possible to state that most monographs and publications of the Soviet period of historiography were marked by the influence of the political situation, a simplified approach to covering the history of the Ukrainian peasantry, deprivation of its national features and artificially inscribed in an amorphous community – the Soviet people. In the late 1980s and early 1990s of the 20th century, there was a gradual transition from a rigidly regulated formational approach, in which the village was considered as an object of the party policy and economic indicators, to the study of the countryside as a subject of history.

The national historiography underwent radical changes, as most Ukrainian scholars began to integrate new methodological approaches to the study on the historical processes actively after the declaration of independence of Ukraine. By comparing different views and concepts and, rejecting political bias, the scholars achieved much greater objectivity in reflecting the historical development of the Ukrainian village, analyzing its socio-political and socio-economic transformations. Historiographic methodology was supplemented by the use of synergistic (analysis of the historical process, social changes and crisis periods was carried out through the prism of nonlinearity, self-organization and human-centeredness) and interdisciplinary (integration of knowledge, methods and concepts from different fields of knowledge) approaches in research. Thus, a vivid example of the implementation of an interdisciplinary approach was the work by the Ukrainian historian V. Nechytaylo, in which the peasantry is presented from a historical and philosophical position. The scholar noted that relying on the concepts of the spirituality, moral norms, and national education the Ukrainian peasantry was able to preserve its spiritual values, age-old traditions, and culture (Nechytaylo, 2004).

The vectors of historical scientific research also underwent changes. The 1990s was the time of the beginning of the reforms in Ukraine. They were characterized by the rejection of the planned economy, the liberalization of prices, the privatization of the state property, as well as the radical transformation of the agricultural sector, which led to the liquidation of the collective farm system and the emergence of the private ownership of land (unbundling). However, the implementation of reforms in the agricultural sector required a theoretical and historical basis. As a result, there emerged numerous publications by famous Ukrainian historians L. Berenstein, P. Panchenko, and O. Kadenyuk, which dealt with the modern agrarian history. In particular, L. Berenstein conducted a multi-faceted analysis that covered a number of the interrelated issues. The main focus of the research primarily was on the socio-economic transformation of the Ukrainian countryside and the justification of the need for the innovative development of the agricultural sector. The above-mentioned research is considered to be significant and was devoted to the historiographical understanding of the issue, the agrarian policy of the political parties and movements, as well as the analysis of the evolution of the agricultural education and science in the context of globalization challenges (Berenstein, 1997).

P. Panchenko, another Ukrainian agricultural historian, carried out the research, which was devoted to the analysis of the agriculture issues in the transitional period, which marked the transition from the planned command system, a priority for the Soviet Union, to the market system, which the already independent Ukraine sought to integrate. The scholar outlined those urgent economic and social issues that required immediate solutions and indicated ways out of the permanent crisis of the agrarian sector in his works (Panchenko, 1995). In general, according to Panchenko's scientific achievements at the end of the 20th century, there could be concluded the key idea regarding his many years of scientific activity: "The further development of the village is perhaps the most important issue of the Ukrainian statehood, since it was due to the village that the national Ukrainian language, national culture and vital traditions were preserved in all the turbulent events of the Ukrainian history of the 20th century" (Panchenko, 1997). This idea emphasizes the priority of a human-centric and nationally oriented approach in the post-Soviet historiography, reducing the role of the Ukrainian village to a fundamental factor of the national identity and cultural resistance in the conditions of the totalitarian regime of the 20th century.

An important source for studying the history of the Ukrainian village in the post-Soviet period was the research conducted by O. Kadeniuk. In his scientific publications, the author, summarizing the experience of higher educational institutions that prepared the personnel potential for work in the agro-industrial complex and the personnel issues and the scientific support of the Ukrainian village, revealed the role of the agrarian scholars in implementing the reform of the agricultural sector (Kadenyuk, 1996).

The beginning of the period of independence was a period when the so-called white spots (gaps) of the Ukrainian history began to be actively studied, any information about which was classified in the KGB archives until the end of the 1980s. One of such topics that exposed the crimes of the Soviet leadership was the topic of the Holodomor of 1932 – 1933 in the Ukrainian countryside. The key figures, who formed the modern canon of the Holodomor research were the Ukrainian historians Stanislav Kulchytsky and Vasyl Marochko. Thus, Stanislav Kulchytsky, in his numerous monographs and articles published over the 30 years since the declaration of Ukraine's independence, made a fundamental transition from stating the fact of the famine to revealing its socio-economic and political mechanism. The researcher argued that the tragedy was not the result of a natural disaster but the result of a conscious policy of the Stalinist leadership aimed at subjugating the Ukrainian peasantry.

At the same time, Vasyl Marochko focused on the source-based aspect, introducing previously inaccessible arrays of documents from the KGB of the Ukrainian SSR and the local party cells into the scientific circulation. His works made it possible to visualize the genocide geography and prove a systematic extermination of the Ukrainians at the level of individual districts.

The joint achievement of both historians was the formation of the genocidal concept of the Holodomor in the 21st century, which is based on proving the subjective intention of the Kremlin to destroy the Ukrainians as a national group (Kulchytsky, 2008; Marochko, 2007). Due to their work at the beginning of independence, the foundation was laid for the legal recognition of the Holodomor as the genocide at the state and international levels. Hence, the work by Kulchytsky and Marochko became a link that connected disparate archival facts into a coherent scientific system, which is considered to be the basis of the Ukrainian national memory nowadays.

The end of the 20th and the beginning of the 21st centuries are characterized by increased scholars' interest regarding the Ukrainian village issues. In particular, there emerged a number of the scientific works on the agrarian history, which clarified certain aspects of the socio-political and socio-economic transformations in agriculture, and studied in detail the demographic changes in the lives of the peasants and the state of ecology in the rural areas. One of the first was a thorough monograph written by the famous Ukrainian historian I. Rybak "Social and Domestic Infrastructure of the Ukrainian village 1921 – 1991" (Rybak, 2000), in which the scholar paid specific attention to the social and domestic changes in the Ukrainian village and highlighted the level of well-being of its inhabitants. Analyzing the social infrastructure of the Ukrainian village in the early 1990s, the scholar concluded that the deterioration of the social and living conditions directly caused the outflow of the rural population to cities, whose more developed infrastructure allowed for a better level of the social security (Rybak, 2000).

There were also some works devoted to the peculiarities of covering the social and everyday life of the Ukrainian village, written by Maryna Ihnatenko "The Village in Our Ukraine: New Political Stereotypes and Socio-Economic Determinants of Changes 1991 –

2008” and Lyudmila Kovpak “Social Life Conditions of the Population of Ukraine in the Second Half of the 20th Century (1945 – 2000)” (Kovpak, 2003) (Ihnatenko, 2009). The authors stated a deep social inequality between the city and the countryside, while analysing a large amount of the factual material, which remained unchanged both during the Soviet era and during the period of independence. The scholars made a conclusion that the well-being of the rural areas was determined exclusively owing to the support of state policy and the strategic lines of presidents and governments (Fedorenko, 2018, p. 127). Such a critical dependence was explained by the paradoxical situation of the agricultural sector. According to the official data, the village provided the entire society with the basic material resources (food, raw materials), though it remained constantly on the periphery of the social development.

Another agricultural historian of the modern period was S. Padalka. Using the latest scientific and methodological approaches, the scholar focused on the study of the agrarian policy in Ukraine and its socio-economic consequences, which is important for the understanding the economic inefficiency of the collective farm system and the causes of the crisis that led to the reforms of the 1990s. It should be noted that there were publications related to the socio-economic transformations in the Ukrainian country side among the scholar’s studies, which are worth mentioning, in particular, such as “Changes in Forms of Management in the Ukrainian Countryside in the 90s of the 20th Century” (Padalka, 2002), “Changes in the Number, Economic Behaviour, Needs and Values of the Ukrainian Peasants (1990 – 2000)” (Padalka, 2013), etc.

In addition to individual scientific works written at the end of the 20th century, the collective monographs remained popular scientific publications, focusing on the socio-political and socio-economic transformations in the rural areas. One of the fundamental historical publications of the mentioned period was a collective monograph, the authorship of which included famous Ukrainian agricultural scholars L. Berenstein, P. Panchenko, S. Padalka, and the others, “Ukraine at the Turn of Historical Epochs (Formation of New Production Relations in the Agrarian Sector of the Economy of Modern Ukraine (1991 – 2000)” (Berenstein, et al, 2000). The study was devoted to the analysis of the formation of new production relations in the agrarian sector of Ukraine during 1991 – 2000. The first part of the monograph was devoted to the theoretical justification of reforms as a necessary condition for the development of the civil society. The historians focused in detail regarding the organizational measures and practical steps in the implementation of the agrarian reform in the second part of the monograph, and there could be found the evaluation of the political and socio-economic consequences of the transformations carried out in the countryside in the third part of the monograph.

The collective monograph “The Ukrainian Village in the 20s – 90s of the 20th Century (Short Historical and Economic Essay)” was another important publication of the above-mentioned period (Berenstein, et al, 1998), published on the basis of the Institute of History of Ukraine of the National Academy of Sciences of Ukraine. The authors analyzed the key events that had influence on the agriculture, the socio-economic structure and the life of the Ukrainian peasants in the 20th century from the new methodological and ideological positions in the work.

The fundamental publication, which rightfully took a priority place among the monographs on the agricultural topics, was the collective monograph “History of the Ukrainian Peasantry” (Smolii, et al, 2000), the authors of which included such famous historians as V. Smolii,

S. Klyuchytsky, V. Danylenko, V. Baran, O. Androschuk, A. Morozov, S. Padalka and the others. The two-volume work summarized the research work in the field of the history of the Ukrainian peasantry, carried out over the past decade and a half. In general, the outdated approaches and stereotypes that were inherent in the Soviet historical science were overcome in the work.

Another monograph, written by the joint efforts of historians and economists N. Baranovska, V. Verstiuk, S. Vidniansky, M. Herasymchuk, V. Horbyk, V. Danylenko, L. Kovpak, M. Kotliar, S. Kulchytsky and V. Lytvyn, is “Ukraine: The Establishment of an Independent State (1991 – 2001)” (Baranovska, et al, 2001). There was revealed the formation process and principles of functioning of an independent Ukrainian state comprehensively in the work. In addition, there were analyzed the key socio-political, socio-economic and cultural changes of the transformation period. Among the thorough analytical, factual and statistical data, attention was also paid to the transformations in the Ukrainian countryside during the period of independence. There were highlighted the economic and environmental factors of agricultural production and the development of the rural culture in the late 20th – early 21st centuries in the work.

The collective monograph “Historiography, Methodology and Source Base of Research on the Agrarian Relations in Ukraine in the Second Half of the 20th Century” by numerous leading scholars L. Berenstein, S. Kulchytsky, P. Panchenko, S. Padalka, S. Zhyvora, N. Tarasenko, N. Sklyar and the others was an important methodological compass and critical source, which enabled to comprehend both historical research and modern economic realities of the transformation of the Ukrainian countryside (Berenstein, et al, 2000). Its authors carried out a critical analysis and evaluation of the research (by historians, economists, and agrarians) on the socio-political and socio-economic processes in the Ukrainian countryside in the second half of the 20th century, based on the principles of historicism. There were also the methodological recommendations on the methodology of the further research into the agrarian relations and the source base for studying the modern agrarian sector of Ukraine in the work.

The joint work by foreign and domestic scholars was an interesting experience of the scientific explorations. The rural area of Ukraine was also one of the chief focus, among the many topics that interested the foreign scientists. In particular, the Professor of the Faculty of Political Science of the University of Naples named after Federico II, A. Graziosi, devoted much effort to the study on the Ukrainian peasantry. In the collective work “The Inconvenient Class in Modernization Projects”, the scholar, together with other foreign and domestic historians D. Beauvois, Yu. Prysiazhniuk, O. Mykhailiuk, S. Toktsky and A. Zayarnyuk, tried to assess the role and importance of the peasant component in the history of the 20th century (Graziosi, et al, 2010). Thus, the French historian Daniel Beauvois proved that the figure of the peasant became a central figure in the history of Eastern Europe, and the peasant nation in general, according to A. Graziosi, had a powerful heuristic potential for the historical science. The above-mentioned is the evidence of the fact that the agrarian history continued to remain a relevant topic in the scientific research of the historians.

The modern stage (the first third of the 21st century) is marked by the desire to implement world historiographical trends. That is why, the Ukrainian historiography faced new challenges. Thus, according to historian Yu. Prysyazhnyuk, the majority of domestic historians scholars adhere to the European historical tradition generally and, therefore, their works were limited to the abstract tasks, and only a few make efforts aimed at creating new interdisciplinary syntheses (Prysyazhnyuk, 2021, p. 26).

The current stage (the beginning of the 21st century) is marked by the active implementation of the world historiographical trends. A vivid example of a new methodological understanding of the history of the Ukrainian village and its inhabitants could be found in the works by Anatoliy Morozov (Kornovenko & Morozov, 2023), Serhiy Kornovenko (Kornovenko, & Kompaniyets 2024), Vasyl Ilnytskyi (Ilnytskyi, & Vasylenko, 2024), Serhiy Lyakh (Lyakh, 2023), Volodymyr Starka (Ilnytskyi, & Starka, 2024), Ihor Farenyi (Farenyi, 2024) and others. These studies represent a change in the research paradigm: from a narrow-profile presentation of the facts to a large-scale interdisciplinary synthesis, which allows us to understand rural society as a multifaceted socio-cultural phenomenon.

**Conclusions.** Thus, we can conclude that there was a move away from an ideologized Soviet description of successes as there was the transformation of the historiographical understanding of the Ukrainian village in the second half of the 20th and early 21st centuries based on a formational approach to covering history, toward an interdisciplinary, critical, and human-centered analysis of the political, economic, social, and cultural processes.

Being quite cautious in the statements, the historians, the authors of thorough works on the topic of the Ukrainian village created in the sixties and seventies of the 20th century were unable to analyze the historical development of this “cradle of the Ukrainian nation” with due objectivity. Emphasis was placed exclusively on the growth of production, mechanization of the agricultural sector, and the successes of the collective farm and state farm system, while the tragedies of the Ukrainian countryside, such as the Holodomor, repressions, demographic losses, unsatisfactory levels of social security, labor migration, and actual exploitation of peasants, were simply ignored.

As a result, maintaining the main line of the Communist Party’s policy and taking into account material about positive changes only, as well as rejecting one of the main principles of historical science, i.e. the principle of objectivity, led to the creation of an ideologically biased, inferior, and distorted image of the Ukrainian countryside, which served exclusively to legitimize Soviet agrarian policy. Therefore, the scientific achievements of contemporary historians were methodologically limited by the ideological framework of the Soviet historiography despite the thoroughness in collecting permitted materials.

After a short transitional period of historiographical searches (late 1980s – early 1990s), which initiated the processes of de-ideologization of history, the destruction of the Soviet myths and the beginning of the new methodological concepts formation, the Ukrainian historiography moved to a modern stage of development. A historiographical breakthrough occurred due to the works by such scholars as L. Berenstein, S. Kulchytsky, P. Panchenko. The main emphasis shifted to rethinking the tragedies of the Ukrainian peasantry and criticizing the collective farm system as ineffective and anti-human. The research was updated on the social degradation of the village during the period of “stagnation”, the economic consequences of the collapse of the USSR and the unsuccessful agrarian reforms of the 1990s. The issues related to the human dimension of transformational changes, the mentality of the peasantry, environmental factors and cultural transformations of rural space in the conditions of a market economy and globalization.

The modern Ukrainian historical school is characterized by the desire to implement world historiographical trends, which will enable agricultural historians to move from a limited abstract description of facts to a thorough understanding of the role of the peasantry as an important component of the Ukrainian nation in the modernization projects of the 20th and 21st centuries.

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## РЕЦЕНЗІЇ / REVIEWS

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**POST-WAR SOCIAL POLICY THROUGH THE PRISM OF CHILD ORPHANAGE IN THE UKRAINIAN SSR (a peer-review of the publication: Bezlyudna, I. Orphans of the Postwar Ukrainian SSR: Everyday Life, Challenges, and Adaptation (the Second Half of the 1940s – First Half of the 1950s). Kyiv: Institute of History of Ukraine, National Academy of Sciences of Ukraine, 2025. 232 pp., ill.)**

**ПОВОЄННА СОЦІАЛЬНА ПОЛІТИКА КРІЗЬ ПРИЗМУ ДИТЯЧОГО СИРІТСТВА В УРСР (рецензія на видання: Безлюдна І. Діти-сироти повоєнної УРСР: повсякденність, виклики та адаптація (друга половина 1940-х – перша половина 1950-х рр.). Київ: Інститут історії України НАН України, 2025. 232 с., іл.)**

Diverse domestic and foreign scholars focused on the issues of post-war childhood and orphanhood in Ukraine. Certain aspects of the social situation of children in the early

post-war years, in particular the phenomena of orphanhood and homelessness, everyday life in the Ukrainian villages, and the social challenges of the 1940s and 1950s, have been highlighted in the studies by O. V. Sheremeta, V. P. Shvydkiy, and I. A. Yakimenko (Sheremeta, 1998; Shvydkiy, 2007; Yakimenko, 2012). The socio-economic conditions of life in post-war Ukraine and their impact on the environment for children have been analysed in comprehensive studies by I. M. Romanyuk, L. V. Kovpak, and G. M. Holysh (Romanyuk, 2005; Kovpak, 2003; Holysh, 2005), while the functioning of special children's institutions in the Ukrainian SSR in 1943 – 1950 has been studied by L. G. Lysytsia (Lysytsia, 2021). A foreign perspective on the transformation of the institutional child care system has been covered in the works published by B. Lough and P. Panos (Lough, & Panos, 2003).

At the same time, despite existing scientific research, the everyday life of orphaned children in post-war Ukraine, their adaptation strategies, social practices, and survival mechanisms in the second half of the 1940s and first half of the 1950s have remained fragmentarily covered for a long time. In this regard, the monograph “Orphans of the Postwar Ukrainian SSR: Everyday Life, Challenges, and Adaptation (the second half of the 1940s – first half of the 1950s)” is a pertinent and useful study that naturally enhances the contemporary historiographical discourse, by fusing everyday life studies with an analysis of social vulnerability and the experiences of “silent” population groups. Since it clearly illustrates the discrepancy between the official rhetoric of state care and the actual practices of orphaned children's survival in the post-war era, there is a decidedly demythologising quality in this monograph. Given the current humanitarian issues brought on by war and the rising number of children, who have lost their parents, its applicability is increased, providing the study both historical and socially significant dimension.

The broad source base is considered to be an indisputable advantage of the study. The materials from the Central and Regional Archives, regulatory and legal documents of the Soviet authorities, statistical reports, memoirs of contemporaries, as well as the achievements of domestic and foreign historiography were incorporated into the above-mentioned monograph. An important advantage is the introduction into scientific circulation of a significant array of little-known archival documents, which significantly improves our understanding of the daily lives of orphaned children. Due to the comprehensive approach, it was possible to revive the real living conditions of orphaned children and also to reflect critically on the discrepancies between the official rhetoric of the “state care” and the everyday practice of the care system.

The application of the tools of Everyday life history and social history is considered to be a vital methodological achievement of the study. Based on the analysis of the daily life, nutrition, disciplinary practices, educational process, and psychological adaptation of orphans, the author managed to demonstrate convincingly the complexity and contradictions of the processes of socialization of children in post-war society.

The structure of the monograph is logical, well thought out, and corresponds to the stated subject issue. The division into three chapters enables a comprehensive coverage of various aspects of the lives of orphaned children – from life on the streets to the institutional and semi-institutional forms of care and integration into the “adult” world.

The causes of mass child homelessness in the post-war Ukrainian SSR are studied thoroughly in Chapter 1 of the monograph, which were caused by war losses, a deep socio-economic crisis, famine, and the general disorganization of post-war society. The analysis of state policy on overcoming homelessness is critical and balanced: without denying

the existence of attempts at institutional response, the author demonstrated their limited effectiveness and formal nature quite convincingly.

The researcher's observation that child homelessness was not exclusively the Soviet phenomenon is crucial. The author placed the Ukrainian orphanhood issue in a broader European context, providing comparative statistics on the scale of orphanhood in post-war Europe. In particular, after the war there were about 49,000 orphans in Czechoslovakia, 60,000 – in the Netherlands, approximately 200,000 – in Poland, and approximately 300,000 – in Yugoslavia, in 1946, there were 147,000 orphans in Italy, about 200,000 – in Greece, and the total number of orphans in Europe was estimated at 13 million (p. 24). A comparative analysis of statistical indicators, in particular a comparison of the situation in Ukraine and other European countries (p. 41), strengthens the author's argument significantly and broadens the analytical horizons of the study. It is shown that during the post-war period, the Soviet state declared an active policy aimed at the so-called "cleansing" of urban space from homeless and neglected children, with the involvement of the police and the public. At the same time, the authorities adopted numerous regulations and created commissions for the placement of children in need of the state care, designed to regulate measures to find a solution to the issue on child homelessness, which provides a proof regarding the scale and systematic nature of the state's declared efforts in this area (p. 45). At the same time, the author argued convincingly that these activities were mainly limited to identifying and removing children from the streets and temporarily placing them at the police stations and reception centres before finding them permanent homes. The issue on ensuring adequate or at least minimally acceptable conditions for children in these institutions – in terms of material, sanitary, and personnel resources – remained outside the focus of the state authorities. The reception centres suffered chronically from a lack of clothing, bedding, and qualified personnel, and children were often kept there for several months due to the critical overcrowding of orphanages throughout the republic (p. 64). Chapter 2 focuses on analyzing the conditions of orphaned children in children's homes in the postwar Ukrainian SSR. In detail the author studied the staffing and material resources of these institutions, the state of medical and sanitary services, the peculiarities of nutrition, daily life, and the organization of the educational process. Based on the archival sources and testimonies, the everyday life of orphanages is presented as a space of chronic deprivation, overload, and constant psychological tension. Due to the use of a wide range of sources, it was possible to recreate the everyday practices of children's lives and demonstrate the gap between the official rhetoric of state care for children and the real conditions of their existence. The author emphasized that due to a chronic lack of space and a significant number of children in need of placement, orphanages in the Ukrainian SSR were systematically overcrowded (p. 75), and unbearable overcrowding was one of the most pressing problems facing all institutions in the republic during the period under study (p. 98).

The material provision of orphanages remained extremely limited (p. 99), which resulted in a shortage of the most essential everyday items for the children. Chief focus is on the nutrition issues in the chapter: in orphanages, established dietary standards were systematically not observed due to unjustified cost-cutting and the replacement of prescribed products with lower-quality and cheaper substitutes. The author justifiably characterized the overall level of medical and sanitary care provided to children as extremely unsatisfactory (p. 110).

The staffing problems were also significant: the provision of qualified personnel for orphanages was hampered by a low prestige and inadequate remuneration of such work.

As a result, these institutions were often staffed with non-professional or poorly qualified personnel (p. 134).

The author provided inspection materials from the Komarivskiy Special Children's Home in Kharkiv region appropriately, which preserved in the State Archives of Kharkiv Oblast (p. 78) in order to characterize a comprehensive picture regarding the conditions under which orphans lived in specialized institutions. According to the archival documents, the state of care for children was critical, and at times catastrophic, adding further source depth and a high level of empirical credibility to the study.

There was covered the Soviet practice of patronage and integration of orphans into the "external" social environment – through collective farms, foster families, and mechanisms for preparing them for independent life in Chapter 3. According to the study, the state material support for children was extremely limited and insufficient, making it impossible to meet even the most basic needs (p. 143). In addition, the everyday lives of orphans were marked by chronic food shortages, which had a negative impact on their physical condition and capacity for adaptation (p. 150). Taking into consideration the collective patronage experience, the author made a well-founded conclusion regarding its low effectiveness as a form of care and upbringing for orphans. Although in the first postwar years this practice to some extent helped relieve the burden on orphanages, in most cases children's living conditions remained unacceptable even by the most modest standards of existence (p. 153).

A chief focus in the chapter is on the employment issue of adolescents under state care. As it was noted by the author, this issue remained unresolved during the entire period under study and at times took on a "competitive" nature between local authorities, which were obliged to ensure employment of adolescents, and industrial enterprises that often evaded fulfillment of these responsibilities (p. 171). One more conclusion is important that even under conditions of an acute need for labour during the postwar reconstruction, the ministries and agencies of the Ukrainian SSR did not demonstrate sufficient interest in employing orphaned adolescents, which pointed at the contradictions between the declared social policy and the actual practices of state care (p. 190).

The inclusion of appendices and an index of orphanages enhances the scholarly and reference value of the monograph significantly.

Overall, I. Bezliudna's monograph demonstrated the complexity and contradictions of the postwar reality of child orphanhood in the Ukrainian SSR, revealing the mechanisms of state care, everyday survival practices, and children's strategies of social adaptation in the context of postwar transformations. The study is distinguished by a solid source base, well-balanced generalizations, and an interdisciplinary approach, which makes it possible to reinterpret the social history of the postwar period in a new way. The publication constitutes a significant contribution to the national historiography and will be useful both for professional historians and a wide range of scholars engaged in the study of the 20th century social history.

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**KNOWLEDGE AND OVERCOMING OF “SOVIET MAN”**

**(a peer-review of the monograph: Soviet Identity: Formation – Rooting – Deconstruction: Collective Monograph / Scientific Editor O. A. Koliastruk. Vinnytsia: Tvory, 2025, 352 p.)**

**ПІЗНАННЯ І ПОДОЛАННЯ “РАДЯНСЬКОЇ ЛЮДИНИ”**

**(рецензія на книгу: Радянська ідентичність: формування – вкорінення – деконструкція: Колективна монографія / за наук. ред. О. А. Коляструк. Вінниця: Твори, 2025, 352 с.)**

The formation issues and features of the soviet identity have long been in the focus of the Ukrainian historians, anthropologists, psychologists and linguists, who comprehend the influence of soviet totalitarianism and the socio-cultural environment on several generations of “the soviet people”. In April 2025, the ninth all-Ukrainian scientific seminar “Everyday Life: Visions and Senses” was held in Vinnytsia, the materials of which formed the basis of the monograph “Soviet Identity: Formation – Rooting – Deconstruction”. Its authors are famous Ukrainian historians and cultural scholars, and the editor is Professor Olha Koliastruk, one of the most famous modern researchers of the Soviet everyday life.

Structurally, the monograph consists of four chapters. Chapter 1 “Formation of “the Soviet Man” and Formation of the Soviet Identity” contains six subsections, which deal with terminological, historiosophical, and conceptual theoretical aspects, as well as practical mechanisms for formatting the soviet model of “a new man”. Olena Stiazkina emphasized that in the 1910s – 1920s the term “sovietism” in Ukraine was not identical to “soviet” and was even condemned as a separate movement. From the mid-1920s, everything Moscow/Russian began to be identified with “soviet” (“radiansky”), and after World War II these concepts actually became synonymous with “Russian” (p. 30).

In the next paragraph, Larysa Yakubova emphasizes that the soviet identity is still manifested among the Ukrainians and gives examples of people who knowingly committed treason during the Russo-Ukrainian war, switching to the enemy’s side and motivating their act with the desire to revive the USSR. One of them is Hennady Paraskevych, a sixty-year-old military pensioner (a doctor). He was not at the top of power and is not the son of the soviet general. It is a man who lived in military garrisons, served in Belarus, Ukraine, eventually ended up in the Russo-Ukrainian war, and has served in the Armed Forces of Ukraine since 2022, supposedly saving the lives of Ukrainian soldiers. And two years later, he was exposed as the FSB agent who gave away the positions of Ukrainian troops. L. Yakubova called him “an absolutely classic mold of the soviet person”. In his interview, without any emotions, he said that he liked “that project” (i.e. the USSR), he felt like an organic part of it. He worked for the Russian Federation not for money, but “at the call of the heart”. On the one hand, the man treated soldiers, saved their lives, and on the other – guided missiles at the positions of the Armed Forces of Ukraine. The motives are voiced by H. Paraskevych as follows: “I am a supporter of the former great country. I started serving in it and decided to continue serving. I had no selfish goal” (pp. 34–35).

L. Yakubova notices the phenomenon of “undying sovietism” not only in Ukraine or Russia, but also in the West, where there are many supporters of the “fantastical/fictional soviet system”. One of these, in her opinion, is Professor Rüdiger Kipke, a co-author of the Russian book “A Brief History of the Crimea” (Moscow, 2022). In this book, he relies on the Soviet and Russian historiography exclusively, writing about the Crimea as an integral part of Russia, condemning the Revolution of Dignity in Ukraine. In general, he carefully outlined the Kremlin’s version of the annexation of the Crimea in 2014 (pp. 38–41). L. Yakubova notes quite rightly the following: in order to accelerate “the recovery of Ukrainians”, we must call everything we have in our historiographical work in adequate, human language. In addition, to re-examine the algorithms of sovietization used by the Bolsheviks to master the mass consciousness, the methods and tools of constructing the mass “sovitska – radianska – sovietska” person (p. 43).

According to L. Yakubova, only in the 1930s, during the Holodomor and total repressions, Ukraine was forced to enter a dichotomy regime in all social strata: if you want to live, be silent, if you want to live, cooperate. Therefore, the so-called “Great Break”, which meant complete collectivization and Stalinist industrialization, was actually a radical change in the foundations of being, the paradigm of existence (p. 45). Dualism/Manicheanism is an inherited program of thinking of the (post)Soviet man. The foundations of mental and value ambivalence are clear: Ukraine and Ukrainians are still in their post-totalitarian transit – a process of mental transformation, splitting of the previous totalitarian mental/cognitive matrix (p. 51).

In her paragraph the researcher Alla Kyrydon analyzed the concept of “habitus of the Soviet” (according to the concept of P. Bourdieu) and stated that since the independence of Ukraine, “a residual of sovietness” had been observed. Sovietness was not only a political, but also linguistic, cultural, and ideological phenomenon. Therefore, when the state and political system ceased to exist in 1991, linguistic, cultural, and ideological phenomena remained in one or another environment. Sociological surveys often showed remnants of the Soviet thinking among the Ukrainians, 46% of whom regretted the collapse of the USSR as early as 2010. A. Kyrydon suggested defining “sovietness” as a chronoimage of a unique socio-cultural identity and the social matrix of the society existence during the corresponding era (p. 76). Therefore, she developed the periodization of the Soviet person formation: Stage I (the 1920s – the 1930s) – the initial stage of the formation of the Soviet person; Stage II (the late 1930s – the 1950s) – the transformation of sovietism into a stable norm; Stage III (the 1960s – the mid-1980s) – the modification of sovietism in accordance with the period of stagnation with the corresponding characteristics; Stage IV (the mid-1980s – 1991) – sovietism in the context of radical socio-political and socio-economic transformations; sovietism in the context of “cognitive dissonance”; Stage V (from 1991) – rudimentary and latent sovietism/soviet, variability of the characteristics of “sovietism” and formatting of the Soviet chronotype in unison with the nature of events (pp. 78–79).

The historian Olha Koliastruk also focused on the mechanisms of “forming the Soviet person”. According to her, the “homo sovieticus” project in the early soviet era existed simultaneously as an ideological appeal, a poster slogan, and an experimental model; the entire propaganda system, educational and cultural institutions, as well as power structures, worked to materialize it, which were supposed to ensure compliance with the given parameters and prevent unwanted deviations. The soviet person was constructed from above in the course of military and repressive selection, contrary to the natural laws of self-identification, when a person has the right and the possibility of choice (pp. 110–111). In the mid-1930s, the official ideology “soviet people” appeared, and from the mid-1950s, the number of published periodicals in the title of which this concept was used increased. A new wave of using the concept of “soviet people” in official discourse occurred in the second half of the 1970s in connection with the discussion of the new Constitution (pp. 118–119).

A historian Serhiy Kornovenko published the paragraph on the spread of H. Shchedrovtsky’s “organizational and activity games” in the USSR in the late 1970s and early 1990s. According to H. Shchedrovtsky, game-based modelling practices could be useful in solving urgent problems of the time. The field for the application of “organizational and activity games” (OAG) became problematic issues that occurred at soviet enterprises of that time and were related to their effective management, their competitiveness, the election of directors, and the training of managerial personnel at various levels. The services of methodologists were actively used by enterprise managers, representatives of the soviet authorities, etc. In particular, orders for the games came from Moscow leaders, directors of individual factories, economic institutes, and regional executive committees of the CPSU (p. 128). As S. Kornovenko notes, the OAG became a tool for implementing H. Shchedrovtsky’s plans to infiltrate the government. In fact, during the games, methodologists got to know the then state-party and economic Soviet nomenclature, forming their new worldview and thinking (p. 130). Owing to this, a cohort of people was formed who, after the collapse of the USSR, continued to implement H. Shchedrovtsky’s methodology in the form of political technologies in the post-soviet space. They managed to enter the political establishment of

post-soviet Russia, significantly influencing the formation of its system of power, ideology, etc. In the 1990s and early 2000s, they consulted and shaped the thinking of such politicians of the Russian Federation as B. Nemtsov, S. Kyriyenko, I. Khakamada, A. Chubais, V. Putin, etc. They participated in the political campaigns of Yeltsin’s Russia. In the second half of the 1990s and early 2000s, some of them formulated and developed “the Russian world” as the ideology of the aggressor (pp. 132–133).

In Chapter 2 “Soviet Socialization of the Personality: Ways, Tools, Consequences” Tetiana Boriak analyzed the phenomenon of “non-truth” as a component of soviet totalitarianism and social engineering deeply and comprehensively. The author writes the following: “*The non-truth* has become a cover for crimes and totalitarianism, a means of involving the widest possible circle of people in criminal activity against other members of society restructuring the mental settings of tens of millions. *The non-truth* was to fill the void created by the destruction of family ties, religious beliefs, and traditional notions of the Ukrainians with ideology and newspeak” (p. 175). In essence, a simulacrum of reality was formed, which replaced the real world for voluntary and forced participants in the soviet party’s social engineering.

Of a particular interest is Nani Hohokhia’s section “Political Mobilization of Children to Participate in Mass Campaigns of the Soviet Government on the Eve and During the Holodomor”. The author writes about children’s participation in collectivization, the fight against “enemies of the people,” anti-religious measures of the government, and militarization. She notes, however, that not all children in Ukrainian villages during collectivization were a weak-willed material for Bolshevik upbringing. Numerous reports on political sentiment in the village recorded the existence of “anti-soviet sentiments” among children, which the authorities attributed to the “class-hostile influences” of the family. Cases were described when children “voted in whole groups and schools against collectivization, refused to go to classes “in protest against the demand that their parents fulfill the state obligations they had assumed for grain procurement,” participated in speeches against the authorities, led anti-soviet demonstrations, broke windows in village councils, and dismantled stockpiles together with adults (pp. 181–182).

The author describes the involvement of children in political campaigns and agitation during elections. Children were mobilized for propaganda and agitation work: they drew slogans, decorated polling stations with portraits of leaders, held conversations with parents and neighbours, convincing them to vote for the nominated candidates, telling about the success of the authorities in construction. Children were massively involved in the fight against regalia, and were the members of “The Union of Atheists”. Under the influence of aggressive anti-religious propaganda, the pioneers wrote letters denouncing priests and fellow villagers believers (pp. 185–186). The communist party considered it an even more important goal to mobilize the pioneers for large-scale aggressive processes of collectivization, dispossession, the fight against “stealers of socialist property,” and harvest protection. The most tragic aspect was the participation of children in grain procurement and the campaign “to liquidate kulakism as a class”. At the same time as the grandiose criminal attack on the peasants, the authorities formed in the children’s imagination a negative image of the internal enemy – the “kulak” (pp. 187–188). Examples of exemplary children’s struggle against the kulaks were given in reports on the leadership of the Young Pioneers: in Odesa, Dnipropetrovsk, Kherson, Kharkiv and other regions, the pioneers exposed pits with grain, stopped carts on which the peasants tried to take out and hide grain, brought livestock to the collective farm

that the parents tried to hide, exposed relatives who did not hand over grain, refused to accept relatives until they handed over the grain, under the guise of searching for pigeons, climbed onto neighbours' roofs and found hiding places there, which they reported to local party activists. Denouncing fellow villagers was called "a matter of honour" in the press. In 1932 – 1934, the expansion of "the young watchmen of the Bolshevik harvest" movement reached a large number of children in the republic (p. 192).

As N. Hohokhia notes, by setting children against their fellow villagers and relatives who were looking for opportunities to survive under the terrible conditions of the collectivized village, the authorities drove a wedge between different generations of peasants. To make the choice easier for children, the authorities made sure that the official discourse became dominant, excluding alternative possibilities. Issues of national identity were recognized not only as unimportant, but even harmful. The official totalitarian discourse removed all others from the discursive field. In the first place in the hierarchy of identities of the Ukrainian child, the key signs "soviet child", "faithful Leninist" were placed. Children began to position themselves as sons and daughters of the party, the authorities, the state. The child's identity was most actively created through the image of the enemy using the opposition "friend-enemy", "enemy-friend" (pp. 201–202).

In Chapter 3 "Soviet Man as the Object and Subject of History" Roman Podkur attempted to determine the socio-anthropological parameters of employees of the Soviet state security agencies in the 1920s and 1930s. Opening access to personal files, archival criminal cases, and materials of official investigations into state security employees allowed the author to outline "the socio-anthropological parameters of the Chekists". He recorded the following factors influencing the personality formation of a state security officer: military actions that taught a person to kill, formed the primary features of the "image of the enemy", which were later adjusted and gained a voluminous image; the environment of the party-Soviet apparatus; communist propaganda, membership in the Communist Party; constant demonstration of political loyalty to the first person (the party leader); participation in a patron-client group; career prospects; family, in general, the military-Chekist corporation that controlled not only everyday life of the Chekist, but also his family, since the Chekists were formed together with the system of state terror and were at the same time its element and tool (p. 243).

The historian Oksana Hodovanska analyzed the role of soviet teachers in "the cause of educating a person of communist society". Based on archival materials (primary party organizations in schools of Lviv region of the Ukrainian SSR in the 1940s – 1980s, namely, minutes of meetings and sessions, personal meals, explanatory notes of the CPSU members, reports of komsomol secretaries at party meetings), the author concluded that the soviet teachers as a professional community were carriers of collective subjectivity and, at the same time, were a collective object of practical influence from the totalitarian state and communist ideology. In general, according to the author, the soviet teachers rejected individual subjectivity in favour of collective subjectivity. They preferred to avoid self-presence "in the matter of educating a person in communist society," and avoided conscious connection with themselves in favour of a joint multiple performance, for example, joint discussion of all kinds of school events or joint holding of any school events (p. 255).

In the same section, Natalia Kushka published the study on the self-identification of cultural figures (singers, composers) in the Soviet era (pp. 257–270). Serhiy Slobodianiuk showed the emergence and spread of the Ukrainian national communism as a kind of resistance to the Soviet identity (pp. 271–287).

Chapter 4 “Catalysts of Overcoming and Preservatives of Soviet Identity” focuses on various aspects of the modern Russo-Ukrainian war. Thus, Olena Boriak traces the “sovietness” of the Russian occupiers through the prism of residents’ testimonies of Chernihiv and Kyiv regions, who were under occupation for some time in 2022 (pp. 289–300). Nadiya Honcharenko characterized the problems of preserving Ukraine’s cultural heritage in wartime (pp. 301–322). The methodological paragraph by Natalia Voronchuk is noteworthy, in which the author considers how to explain soviet to high school students as alien. She cites the results of an annual survey of Grade 11 students in one of Kyiv schools. To the question “Do you think that soviet is alien to Ukrainians today?”, the number of positive answers increases every year, which is a very encouraging sign. In 2025, 42% of students answered so (p. 343). Of course, overcoming the soviet identity is possible only through education and upbringing, expanding the study of Ukrainian studies disciplines at school, the scope of which is constantly decreasing due to the reform “New Ukrainian School”.

The analyzed monograph also has some shortcomings inherent in all collective works formed on the basis of thematically similar texts. These shortcomings include the lack of clear objectives and, accordingly, holisticity, coherence and holistic generalizations. We think that Professor Yuri Kahanov, the author of the fundamental work on the construction of the Ukrainian version of “the Soviet person” in the post-Stalin era, should have been invited to the authorship team. Despite everything, the peer-reviewed monograph demonstrates the most pressing problems in understanding the phenomenon of “the Soviet man”, suggests new theoretical and methodological principles of the research, reveals previously little-studied mechanisms of “homo soveticus” formation, and shows the features of its socio-cultural behaviour.

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