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імені Івана Франка, вул. Івана Франка, 24, м. Дрогобич, обл. Львівська, 82100.
тел.: (0324) 41-04-74, факс: (03244) 3-38-77, e-mail: halivm@yahoo.com

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Taras BATENKO

PhD (Politics), Associate Professor, Verkhovna Rada of Ukraine, 5 Mykhailo Hrushevsky Street, Kyiv, Ukraine, postal code 01008 (batenko.scientist@gmail.com)

ORCID: 0009-0005-6588-2192

ResearcherID: LDG-2344-2024

Тарас БАТЕНКО

кандидат політичних наук, доцент, Верховна Рада України, вул. Михайла Грушевського, 5, м. Київ, Україна, індекс 01008 (batenko.scientist@gmail.com)

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**RELIGIOUS ATTRIBUTION OF EARLY FRANCHE-COMTÉ FIREPLACE
PLAQUES OF THE 16th – THE BEGINNING OF THE 17th CENTURIES**

Abstract. *The purpose of the research is to conduct a comprehensive study and systematise the cast-iron fireplace plaques from the Franche-Comté region of the 16th – the beginning of the 17th centuries, to analyse their symbolism, identify links with the specific religious orders and communities, and demonstrate the role of these artefacts as a source for understanding religious beliefs and the influence of monasteries on the metallurgy. The methodology of the research is based on the systematisation of all known dated plaques from the region, the iconographic, heraldic and stylistic analysis of the reliefs, and the comparison with monastic charters, known armorials and archival materials. In the study there has been used iconographic and historical contextual analysis of the fireplace plaques production in the blast furnaces of Upper Saône in the study. The scientific novelty consists in the first specialised attribution of the plaques from the Franche-Comté region. There was debunked a myth regarding the automatic attribution of the plaques featuring the globus cruciger motif to the Carthusian Order (Ordo Cartusienensis) in the 16th century – by demonstrating that the key element of the Great Chartreuse Coat of Arms – the seven stars – only appeared only from the end of the 17th century onwards. For the first time it has been determined that: the moline (or 'anchor') cross on the 1558 plaque indicates the Cistercian abbeys; the oval Coat of Arms on the 1616 plaque from Avanne belongs to the parish priest Jean Brury of the Order of Malta; the image of a young man in a felt hat on the 1558 plaque is likely St Vernier, the local patron saint of the winemaking. There have been introduced new dates (1501, 1507, 1522, 1555, 1595) and interpretations into the scientific discourse, enabling the reconstruction of iron casting production dynamics and religious practices in the region.*

Conclusions: *the fireplace plaques of Franche-Comté are a unique source that combines religious (apotropaic), political, and domestic symbolism. The Cross of St. Andrew served a protective function and, at the same time, emphasised the national identity of the Comtois; the globus cruciger was interpreted primarily as a symbol of Christ's dominion over the world, rather than exclusively as a Carthusian symbol. The monasteries (the Cistercians and, to some extent, the Carthusians) were considered to be the pioneers of the plaque production, but direct attribution of the tiles is possible only where a complete heraldic ensemble is present. The plaque production is primarily interpreted as a symbol of Christ's dominion over the world, and it clearly correlates with periods of peace and economic prosperity, and ceases entirely during wars (for example, 1595, 1636 – 1650). The elite*

nature of the early plaque (commissioned by the nobility, abbeys, and parish priests) was demonstrated, highlighting their value for the preservation of the cultural heritage of Franche-Comté and for the broader study of European material culture of the 16th – 17th centuries.

Key words: cast-iron fireplace plaques, Franche-Comté, County of Burgundy, heraldry, apotropaic symbolism.

РЕЛІГІЙНА АТРИБУЦІЯ РАНИХ КАМІННИХ ПЛИТ ФРАНШ-КОНТЕ. XVI – початок XVII ст.

Анотація. Мета – здійснити комплексне дослідження та систематизацію камінних чавунних плит регіону Франш-Конте XVI – початку XVII ст. Проаналізувати їхню символіку, визначити зв'язок з конкретними релігійними орденами та спільнотами, показати роль цих артефактів як джерела для розуміння релігійних вірувань і впливу монастирів на металургію. **Методологія дослідження** базується на систематизації всіх відомих датованих плит регіону, іконографічному, геральдичному та стилістичному аналізі рельєфів, порівнянні з монастирськими хартиями, відомими гербовниками й архівними матеріалами. У ході роботи використовувався іконографічний та історико-контекстуальний аналіз виробництва камінних плит у доменних печах Верхньої Сони. **Наукова новизна** полягає у першій спеціалізованій атрибуції плит регіону Франш-Конте. У процесі дослідження було спростовано поширену помилку – автоматичне віднесення плит з мотивом *globus cruciger* до Ордену картузіанців (*Ordo Cartusienensis*) у XVI ст., доводячи, що ключовий елемент герба Великої Шартрези – сім зірок – з'являється лише з кінця XVII ст. Вперше встановлено: молінський (“якірний”) хрест на плиті 1558 р. вказує на цистеріанські абатства; овальний герб на плиті 1616 р. з Аванна належить парафіяльному священнику Жану Брюрі з Мальтійського ордену; зображення юнака у фетровому капелюсі на плиті 1558 р. – це, ймовірно, локальний покровитель виноробства св. Верньє. До наукового обігу введено нові датування (1501, 1507, 1522, 1555, 1595 рр.) та інтерпретації, що дають можливість реконструювати динаміку чавуноливарного виробництва та релігійні практики регіону.

Висновки: камінні плити Франш-Конте є унікальним джерелом, що поєднує релігійну (апотропейну), політичну та побутову символіку. Хрест св. Андрія виконував захисну функцію та водночас підкреслював національну ідентичність комтуазців (*Comtois*); *globus cruciger* трактувався переважно як символ панування Христа над світом, а не єдино картезіанський. Монастирі (цистеріанці й частково картузіанці) були піонерами доменного виробництва, але пряма атрибуція плит можлива лише за наявності повного геральдичного комплексу. Виробництво плит чітко корелює з періодами миру й економічного пінесення та повністю припинялося під час воєн (наприклад: 1595, 1636 – 1650 рр.). Дослідження доводить елітарний характер раних плит (замовники – дворянство, абатства, парафіяльні священники), підкреслює їхню цінність для збереження культурної спадщини Франш-Конте та ширшого вивчення європейської матеріальної культури XVI – XVII ст.

Ключові слова: камінні чавунні плити, Франш-Конте, графство Бургундія, геральдика, апотропейна символіка.

Introduction. The County of Burgundy (Franche-Comté) was an important part of the Burgundian state until 1477, centred around the Dukes of Burgundy, with its developed cult of chivalry, solemn ceremonies for the conferral of the Order of the Golden Fleece, active support for the Crusades, as well as exceptional mastery of diplomacy and dynastic alliances. It was the culture of elegant tournaments, exquisite court attire, and the work of artists, sculptors, musicians and poets – an environment that effectively shaped a distinct European civilisational tradition (Davies, 2008, p. 442).

In fact, the Duchy of Burgundy ceased to exist as a dynastic state after the death of Charles the Bold in 1477. The French King, Louis XI, immediately incorporated the Duchy of Burgundy proper (the territories around Dijon) into the royal domain, as well as other

parts of the Burgundian inheritance that were considered fiefs of the French crown. At the same time, Charles the Bold's other lands – primarily Flanders, Brabant, the Netherlands and the County of Burgundy (Franche-Comté) – passed under Habsburg control due to the marriage of his daughter, Mary of Burgundy, to Maximilian I of Habsburg. The Treaty of Senlis of 1493 enshrined this territorial division legally: France officially recognised the Habsburgs' possession of the lands that later became part of the Holy Roman Empire. Hence, the Burgundian inheritance was finally divided between the French crown and the House of Habsburg, bringing an end to the existence of a unified Burgundian political entity.

According to Norman Davies: “there remained nothing of the Burgundian state” (Davies, 2008, p. 443). However, from a cultural perspective, it was not so, as the cast-iron plaques from Franche-Comté reflect, to some extent, the local community's nostalgia for the lost duchy and its legacy. After 1477, the County of Burgundy continued to retain features of the Burgundian national identity. The province acted proudly as the guardian of this heritage, preserving the Burgundian identity in its heraldry and symbols alongside loyalty to the House of Austria (Vernot, 2009, pp. 112–113). According to Aristide Guilbert: “it is in this province, greater in reputation than in size, that one may find the last expression of the old Burgundian nationality” (Guilbert, 1848, vol. 5, p. 21). Meanwhile, the rest of former Burgundy, with its capital at Dijon, was incorporated into the royal domain of France as a privileged province.

Privileges were granted to the historic province of Franche-Comté by the German kings and Burgundian dukes from the 14th century, and it was not for nothing that it was called a “free county”. In the 16th century, Franche-Comté – this unique republic, an autonomous “free county” – managed, due to its declared neutrality, to avoid the protracted wars waged by France against the Holy Roman Empire and Spain. However, the military events of the 17th century devastated its economy and social structure: this refers to the Ten Years' War (1634/1636 – 1644) as the Comtois 'episode' of the Thirty Years' War, and subsequently to the final conquest of Franche-Comté by France in 1678.

In the 16th century, Franche-Comté was under the control of the Spanish branch of the Habsburg dynasty, forming part of the imperial domains of Charles V, and following his abdication, of the inheritance of his son Philip II of Spain. Its main administrative and military headquarters were located in the town of Dole, the county's capital. At the same time, the city of Besançon, although strategically situated at the crossroads between France, Switzerland and the lands of the Empire, was not part of the County of Franche-Comté, but held the status of a free imperial city (French: *ville libre d'Empire*), directly subordinate to the Emperor. One of the branches of the 'Spanish Road' (Spanish: *Camino Español*) – a land route connecting Milan (a Spanish possession) with the Spanish Netherlands (Flanders) – passed through the territory of Franche-Comté, particularly near Besançon. The above-mentioned route served as a vital transport artery for the Spanish troops, diplomacy, postal services and logistics, particularly during the Eighty Years' War (1568 – 1648).

Problem Statement. Taking into consideration the relief images on cast-iron fireplace plaques from the territory of the former County of Burgundy, produced in local foundries during the 16th – 18th centuries, there could be traced the political dimension: the military and political upheavals of the border region, attitudes towards the Habsburg Empire, the annexation by France, the ideological transformations of the French Revolution of 1789, as well as the evolution of heraldic tastes, religious beliefs and aesthetic preferences of the local population – the Comtois (i.e. the indigenous inhabitants of Franche-Comté). The metallurgical factories of Franche-Comté exported a significant portion of their output,

particularly cast-iron plaques, to neighbouring states and provinces of the Kingdom of France (Vernot, 2013, p. 29). The issue on the cast-iron fireplace plaques of Franche-Comté aren't studied enough in the local and Central Western European history, especially the climate, the cast-iron foundry industry, and the military, political and economic history of the province. Hence, this research is relevant.

The purpose of the research is to conduct a comprehensive analysis and systematise the cast-iron fireplace plaques of the Franche-Comté region from the 16th–the beginning of the 17th centuries; to analyse their symbolism, identify links with the specific religious orders and communities, and demonstrate the role of these artefacts as a source for understanding religious beliefs and the influence of monasteries on the metallurgy.

Review of Recent Research and Publications. Numerous research studies were carried out on the cast-iron fireplace plaques (French: plaques de cheminée) from Franche-Comté in the 16th and at the beginning of the 17th centuries, primarily by the French historians, archaeologists and art historians. The main focus was on the heraldic, emblematic, and socio-political aspects of these artefacts, whilst specialised religious attributions (particularly regarding the Carthusians, the Cistercians, and the Order of Malta) were studied insufficiently.

The research done by Nicolas Vernot is considered to be a key contribution to the study of Comtois plaques. Thus, the author analysed the evolution of the symbolism of the plaques in the context of the transition from the Spanish to French rule, emphasising the role of the Cross of St. Andrew as a marker of Burgundian-Habsburg identity and loyalty in the article “Sentiment d'appartenance et loyautés dynastiques dans la Franche-Comté de Louis XIV: le témoignage emblématique des plaques de cheminée et de l'Armorial général” (Vernot, 2002). In his later works, Vernot studied in detail the technological and economic aspects of production in the Haute-Saône, as well as the apotropaic function of column and cross motifs (Vernot, 2009, pp. 100–101; Vernot, 2013, p. 29). He noted the preservation of the St. Andrew's Cross until the mid-18th century, but did not delve into the religious attribution of early plaques (the 16th century), where the globus cruciger motif was often mistakenly associated with the Carthusians.

The collective study conducted by Belhoste, Claerr-Roussel et al. (1994), “La métallurgie du fer en Franche-Comté” is of utmost importance, as there is a detailed map of 16th-century blast furnaces and an analysis of cast iron production in the Upper Saône region (Belhoste, & Claerr-Roussel et al., 1994, pp. 52–405). The authors dated the start of the mass plaque casting to around 1500 (Vy-le-Ferroux, Vellexon), but did not focus on the religious symbolism.

The oldest plaques were dated to the mid-1550s in earlier works, such as Millot (1978), a view refuted by new finds (1501, 1507, 1522). The issue on the monastic metallurgy was covered in diverse studies (Bouchayer, 1956; Belhoste, 1992; Mordefroid, 1991), which highlighted the role of the Carthusians and the Cistercians in blast furnace production (Allévar, Bonlier), but there was no direct link to 16th-century plaques.

Taras Batenko conducted the study on hearth slabs in both France and Europe as a whole during the Late Middle Ages and the Early Modern period in Ukrainian historiography (Batenko, 2024; 2025; 2026).

Hence, the heraldic, political and technological dimensions of the slabs were covered in the previous studies, but the religious attribution of the early period (the 16th – the beginning of the 17th centuries) remains fragmentary and studied insufficiently.

Dated fireplace plaques from Franche-Comté as an indicator of the dynamics of metallurgical production (1501 – 1651). Military upheavals destroyed the forges and

blast furnaces of Franche-Comté repeatedly, particularly in Haute-Saône, where the largest network of such facilities was located (Fig. 1). These waves of destruction occurred at the end of the 15th century, the end of the 16th century (1595 – 1601) and during the Ten Years' War in Franche-Comté (1634/1636 – 1644), a significant episode of the Thirty Years' War. The cast-iron fireplace plaques began to be used there after the first wave of destruction marked by the collapse of the Burgundian state at the beginning of the 16th century.

It is generally accepted that the establishment of blast furnaces in Vy-le-Ferroux (French: Vy-le-Ferroux) and Vellexon (French: Vellexon) in the Upper Saône around 1500 marked the beginning of a new era of blast furnaces for cast iron production in Franche-Comté (Belhoste, & Claerr-Roussel et al., 1994, p. 52). By the mid-16th century, there were around 15 blast furnaces (ironworks) operating in Franche-Comté. Almost all of them were concentrated in the present-day department of Haute-Saône, making this area one of the most important centres for cast iron production in the imperial territories under the rule of the Spanish branch of the House of Habsburg (Belhoste, Claerr-Roussel et al. 1994, pp. 52–53, 377–405). In contrast, there were several recorded blast furnaces in the mountainous part of the Jura massif, near the Swiss border (in the territory of the modern departments of Doubs and, in part, Jura), which were only modernised during the 16th century, following the Upper Saône model, i.e. using the so-called Walloon method (Belhoste, Claerr-Roussel et al., 1994, pp. 54–55). In order to compare, there were 25 iron foundries in operation as of 1567 in Siegerland, one of the largest centres of cast iron foundry production in the German lands of the time (Schubert, 1937, p. 20).

In the late 1970s it was believed in Franche-Comté that the oldest plaques from the region dated from the mid-1550s (Millot, 1978, pp. 26–27). However, the research conducted in recent decades revealed that the fireplace plaques dated inscriptions on their reliefs were already in use there from the early 1500s. The oldest cast-iron plaques from Franche-Comté dated from 1501 and 1507, bearing the coat of arms of Lord Guillaume II d'Auzelle (the Lords d'Auzelle owned the forges at Fretigney and Greucourt in Fresne-Saint-Mamès, Haute-Saône). Moreover, the 1507 plaque is also the oldest known plaque from the county of Burgundy, shaped like a 'furnace door'. Numerous plaques bearing dates were lost over the centuries – broken, melted down, or sold for scrap; those that were turned over and discarded in various rooms during and after the French Revolution of 1789 fared better. They are still being found today during the demolition work in the old buildings.

For example, there is a fireplace plaque from 1522 featuring a large St. Andrew's Cross in the form of two long stripes. The plaque was found during the demolition work in the 'town hall' building of the village of Bougnon (in the Haute-Saône department, near Vesoul), where it had been buried in the ground, turned upside down, probably during the Reign of Terror. It is evident that it was intended for heating one of the rooms in Bougnon, and the date on the plaque – 1522 – may correspond to the start or the early years of the blast furnace's operation in Bougnon (Fig. 1) (Belhoste, & Claerr-Roussel et al., 1994, p. 382). Hence, this fireplace plaque is in fact a pre-written source, providing grounds to assert the existence of a blast furnace or foundry furnace here as early as 1522, rather than from 1539, as is commonly believed among the scholars. The oolitic phosphatic ore used in the Bunyon forge was deemed unsuitable, as it produced iron that was too brittle, as noted in the research into the quality of iron conducted by the Parliament of Dol in 1562: "as for the iron from Bunyon, it is so unsuitable and of such poor quality that it does not deserve to be accepted and used..." (Belhoste, & Claerr-Roussel et al., 1994, pp. 53, 79). Moreover, the blast furnace enterprise

appears to have declined very rapidly, as no traces of it are found in the archives after the 1560s (Belhoste, & Claerr-Roussel et al., 1994, pp. 58, 63, 382).

The plaques found to date demonstrate that any modern inventory of surviving original plaques is no longer capable of fully reconstructing their distribution. However, such studies enable us to come closer to resolving some of the questions raised in this study: when exactly the use of fireplace plaque began and to what extent this was influenced by climatic changes in the region; during which periods their use was most widespread, corresponding to peaks in blast furnace iron production, and how this correlates with climate change; during which periods the production of fireplace plaques ceased completely or almost completely, which may indicate a partial or total halt in blast furnace production for military and political reasons.



Fig. 1. Map of blast furnaces and refining works in Franche-Comté in the 16th century
 (Source: Belhoste, & Claerr-Roussel et al., 1994, p. 52).

The systematised results of the author's research into the discovery and identification of dated cast iron plaques manufactured in Franche-Comté are presented in the table below. There is a summary of the currently known corpus of plaques bearing cast dates, recorded from 1501 until the end of the Thirty Years' War in the table, and it serves as a basis for further analysis of the dynamics of the cast iron production in the region in relation to the military events and climatic phases.

Table 1

Dated cast-iron fireplace plaques from Franche-Comté, 1501 – 1651

DATED CAST-IRON FIREBACKS FROM
FRANCHE-COMTÉ (1501-1651)

Group	Dates
I	1501, 1507, 1522
II	1551, 1555-1558, 1560-1562, 1575, 1577, 1582-1583, 1585, 1590-1593, 1595
III	1602-1603, 1613-1614, 1616-1628, 1630-1631, 1633-1636, 1651?

Source: author's dataset.

Group I – dated fireplace plaques from the first half of the 16th century, reflecting a period when there were few blast furnaces in Franche-Comté.

Group II – dated fireplace plaques from 1551 to the start of Henry IV's military invasion of Franche-Comté (1595). This phase is characterised by an increase in the number of blast furnaces, a gradual deterioration in climatic conditions, and growing demand among the elite. The small number of dated plaques from the 1560s – 1570s and, to some extent, the 1580s is linked to the economic crisis that befell the County of Burgundy. The shortage of grain and tensions in the agricultural market affected not only food supplies but also the cost of iron (Belhoste, & Claerr-Roussel et al., 1994, p. 56). It should be noted that the plaques from 1560, 1561 and 1562 bear the same personal coat of arms, indicating that they were commissioned by the same patron. Two of these plaques are currently housed in the Citadel of Besançon.

Group III – dated plaques covering the period of the blast furnaces' resumption of operation following the invasion of Henry IV's troops. At the same time, questions remain regarding the absence of dated plaques during the period of 1604 – 1612. According to Nicolas Vernot, it happened due to the slow recovery of the Franche-Comté economy following the military campaign of 1595 and the high price of cast iron. Thus, a genuine recovery in production becomes evident from the 1610s onwards (letter from Nicolas Vernot to the author dated 24 March 2026, CY Cergy Paris Université). There is also no doubt that there was a complete absence of casting of such items during the Thirty Years' War, particularly during the active phase of the Ten Years' War in Franche-Comté – from 1637 to 1650 – when blast furnace production was only partially restored following the end of hostilities. However, as François Lassus noted, blast furnaces destroyed and abandoned by their owners after the Ten Years' War may not have been rebuilt for several decades, and their revival often took place only after a change of ownership. The true revival of blast furnace production in Franche-Comté, which was destroyed during this war, did not occur until 1680 – 1685 (Lassus, 1987, p. 466).

Review of changes in the main hallmarks of Franche-Comté fireplace plaques: technical innovations and policy. There appeared two thin vertical bars, which initially probably served a purely structural function – they were used to reinforce the surface of the cast-iron slab on the 'first-generation' fireplace plaques (from the first two decades of the 16th century) (Fig. 2). However, by the late 1510s – early 1520s, these bars had become thick and carved, taking on a distinctly decorative character and beginning to be interpreted as columns or pillars (Fig. 3).

It should be noted that it was precisely in the 1516s – 1520s that Charles V, after receiving the Spanish crown and subsequently whilst developing his imperial coats of arms for the Holy Roman Empire, introduced the motif of the Pillars of Hercules (colonnes d’Hercule) into his own heraldic system. The above-mentioned created a quite plausible cultural parallel between the development of Charles V’s imperial symbolism and the appearance of column-like elements on the Franche-Comté slabs.

The columns in the form of balusters became the most common element on the Comtois plaques. It is possible that these columns are linked to Charles V, who was the ruler of this region and was considered the greatest military and political figure of the 16th century. In that case, they would symbolise control over the Strait of Gibraltar through the two columns known as the Pillars of Hercules, a famous symbol in Greek and Roman mythology that marked the boundaries of the known world. These columns can also be interpreted: 1) as a religious symbol – perhaps, in the religious imagination of the time, signifying the entrance to Solomon’s Temple in Jerusalem; 2) as symbolising the strength of the structure and, in particular, the strength of the cast-iron plaque; 3) to reinforce the plaque or act as a barrier designed to prevent direct contact with the logs, ensuring better air circulation and, consequently, better combustion (Vernot, 2002, p. 18); 4) the two columns form the basis of the coat of arms of the city of Besançon and are reminiscent of the ancient Roman columns that still stood at the end of the 15th century at the top of the present-day citadel of Besançon, that is, near the Roman road leading from Geneva; 5) simply a decorative element of the cast iron casting. In any case, the columns on the mantelpieces have multiple meanings. There is no single explanation for their appearance. Looking at the fireplace plques from Franche-Comté dating from 1522, one cannot help but admire that, even three centuries later, the tradition of casting plaques in a classic rectangular shape with columns, intended to provide additional heating for rooms, remained intact.



Fig. 2. A plaque from Franche-Comté.
Dimensions: height 90 cm, width 92 cm, depth 3 cm. Its stylistic features allow it to be dated to the first decade of the 16th century. The plaque depicts Jerusalem Cross and two St Andrew’s Crosses, between which two columns are situated

Source: Coll. Musée Comtois.



**Fig. 3. Plaques of 1522 with a large St Andrew's Cross.
Found during demolition work at the town hall of the municipality
of Bougnon (Fr. Bougnon, Haute-Saône Department).
Dimensions: 77x77 cm, depth 2.5–4 cm. In this case, the X-shaped symbol serves
not only an apotropaic function but is also used to reinforce the surface
of the cast-iron fireplace plaque (Kremer. Kaminpkatten)**

Source: Leboncoin.fr

It was possible for us to identify three successive types due to observing changes in the depiction of St. Andrew's Cross on the fireplace plaques from the 16th to the first half of the 18th century.

The form of the St Andrew's Cross evolved over two and a half centuries, from a cross consisting of two long bands/bars in the 16th century (Fig. 4), a knotty version (a militarised variant during the period of military and political rivalry with France in the 1660s – 1680s), to the so-called skittle cross, stylised in the form of crossed skittles from the end of the 17th century (Fig. 5). This latter skittle-type St. Andrew's Cross remained in use effectively until the end of the Ancien Régime, demonstrating the dominance of the aesthetic and religious dimensions over the political.

N. Vernot believed that the St. Andrew's Cross remained on the plaques until the late 1740s, when it was completely supplanted by Louis XIV's 'Sun' and the fleur-de-lis (Vernot, 2002, pp. 39, 56). It was not entirely accurate. The Cross of St. Andrew did not disappear entirely from the late 1740s, though it is extremely rare on the plaques from Franche-Comté. There are known plaques featuring the Cross of St. Andrew, dated 1750, 1754 and even 1775. In foundries, the very mould for the beehive-shaped Cross of St Andrew, used after France's final conquest of Franche-Comté, was often converted to produce a standard cross. For example, there are two fireplace plaques (Fig. 6): 1) 1760, dimensions – 90×90; 2) 1765, with fleur-de-lis petals sawn off during the French Revolution, private collection in the Netherlands, dimensions: width 99 cm, height 81 cm, depth 4 cm, weight 135 kg).



A) B)
Fig. 4. St. Andrew's Cross on plaques: a) 1522 and b) 1555

Source: private collection, Claude Augustin.



A) B)
Fig. 5. Fragments of plaques a) 1709 and b) 1746

Source: private collection, Claude Augustin.



A) B)
Fig. 6. Plaques: a) 1760. Source: Pamfilou/Leboncoin.fr, private collection; b) 1765

Source: Charles Nijman Fireplace Antiques, private collection in the Netherlands.

There may have been around 40 blast furnaces and various types of refining works operating in Franche-Comté during the 16th century.

The production and use of fireplace plaques in Franche-Comté were particularly active in the mid-16th century, when the province's blast-furnace network expanded significantly. It can be traced to the plaques, where the dates are written. Due to the author, who carried out a partial inventory of Franche-Comté plaques, whilst working on this issue, it was possible to identify recorded examples cast in 1551, 1555 – 1558 and 1560 – 1562. Taking into consideration the above-mentioned, the significant number of 'silent' – nameless (without dates, names, letters or coats of arms) – plaques with simple, unpretentious decoration – the columns, an apotropaic triangle in the shape of a temple, a 'globus cruciger' (often combined with the sign of the cross or St. Andrew's Cross) – there was active iron casting activity in the mid-16th century, in the County of Burgundy, particularly in the Upper Saône. The decoration on these fireplace plaques often – crosses or a globe – was cast using a "cord" – a mould created by using carved wooden rods with a spiral profile – the so-called "carved rope".



Fig. 7. Fireplace plaques from 1501 bearing the coat of arms of Guillaume II d'Auzelles. It originates from the family castle of Ray-sur-Saône (French: Château de Ray-sur-Saône) in the Upper Saône, Franche-Comté. Dimensions: height 133 cm, width 141 cm, depth (including the projecting frame) 5.8 cm. According to the formula for calculating the original weight of a cast-iron plaque, its initial weight in the foundry would have been approx. 780 kg (margin of error 4–7%). Registration number: 2014.104.6

Source: property of Château de Ray-sur-Saône (Palasi, 2014, p. 64).

The monasteries of the Duchy of Burgundy were the pioneers of iron casting. The Carthusians. At the end of the Middle Ages, Christian monasteries became the leading centres for the revival of the Roman watermill technology in Western Europe, which began to be used in the iron production (Lucas, 2005). Taking into consideration the iron-ore-rich lands of the Duchy and County of Burgundy, as well as the province of Champagne, the monastic ingenuity of the Cistercian Order, and to a lesser extent that of the Benedictines and the Carthusians, provided the impetus for the revolutionary use of water power in iron production, and later in cast iron production, which eventually culminated in the blast furnace revolution. From the mid-11th to the 14th century, the Cistercians were the leading founders

of the iron ore enterprises and played a dominant role in early metallurgy, outpacing other religious institutions (in particular, the Benedictines) whilst competing with the secular lords (Horikoshi, 2007, pp. 66–68; Verna, 1983, pp. 207–212).



Fig. 8. Fireplace plaque, 1507. It was located on the estate of the Detestay family in the village of Rougemont (Doubs department) (AMC (Besançon). Rougemont (Doubs). 2003). In 2012, it was sold at the La Maison Aguttes auction. Dimensions: width – 1.10 m, height – 1.12 m.

Source: La Maison Aguttes auction.

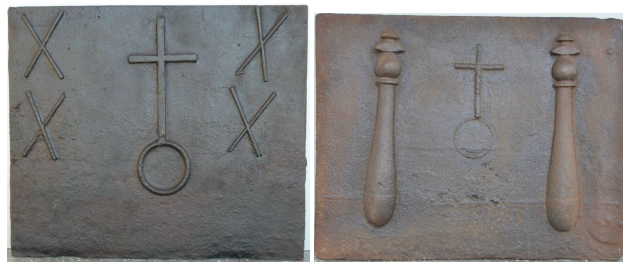
The Cistercians' activities in metallurgy declined gradually from the mid-14th century. According to Benoit Chauvin, a leading researcher on the Cistercian abbeys, there were several reasons, among them was “the economic context of the 14th-century decline: the general weakening of religious orders, a reduction in the recruitment of new members, increasing tax burdens, etc.” (letter from Benoit Chauvin to the author dated 20 October 2025). In addition, the devastation caused by the plague epidemics led many hammer mills to cease operations. This particularly affected the Carthusian forges operating on ore from Allevard in the province of Dauphiné, which fell into decline around 1435 (Belhoste, 1992, p. 5). There were other factors that contributed to the decline of the metallurgical activity, for example, labour shortage, timber and coal shortage, water management issues, the depletion of near-surface ore deposits, and technological stagnation (Bröhl, 2024, p. 150).

The metallurgical activity of the Carthusian monasteries was also significant in scale, alongside that of the Cistercian Order. According to Bouchayer, one of the main reasons that prompted the Carthusian fathers to revive the Gallic iron industry was the Second Crusade (Bouchayer, 1956, p. 144). As it was noted by Belost, iron from Allévar, was controlled by the Carthusians by large, travelled considerable distances: it was transported by mules to barges, and then along the Isère and Rhône rivers to market centres during its medieval heyday, between the end of the 14th and the beginning of the 15th centuries. This iron was sold in the south of France – in Forez, Avignon and Auvergne, as well as in large quantities

in Lyon, at the fairs of Chalon, and even reached as far as Dijon (Belhoste, 1992, p. 5; Bouchayer, 1956, pp. 149–150).



A)



B)

C)

Fig. 9. a) a fireplace plaque in the shape of an 'oven door'. Columns with a triangle in the form of a temple. Dimensions: height 77 cm, width 79 cm, depth 4 cm, weight 68 kg; b) rectangular fireplace plaque with a "sphere and cross" and four St. Andrew's Crosses. Dimensions: height 69 cm, width 80 cm, depth 2 cm, weight 66 kg; c) a rectangular

fireplace plaque with a ball and cross made of "carved rope" and two massive columns. Dimensions: height 53 cm, width 62 cm, depth 6 cm, weight 69 kg.

Dimensions: height 53 cm, width 62 cm, depth 6 cm, weight 69 kg.

Source: Claude Augustin.

Hence, it can be concluded that the so-called blast furnace revolution was already starting in the 13th century, in the monastic and mountain forges. The main monastery of the Carthusian Order – La Grande Chartreuse – is situated in the Alps, near the town of Saint-Laurent-du-Pont. It is situated in the mountainous and wooded Chartreuse range, in the historic province of Dauphiné, now in the department of Isère (French: Isère) in the Auvergne-Rhône-Alpes region, not far from Grenoble. The monastery was actively involved in ferrous metallurgy – particularly in the forges of Guiers-Mort – with the support of the Dauphin and local counts (Bouchayer, 1956, pp. 144–145). The monks of

the main monastery of Saint Bruno had a blast furnace and water hammers at the foot of the Chartreuse Mountains, at the entrance to the monastery valley in the 16th century (Boutrais, 1891, pp. 3–4). At the same time, they endured the difficult period of the religious wars, which effectively brought their iron-casting activities in the Allévar region to a halt (Bouchayer, 1956, pp. 154–155).

It is likely that it is to the Carthusians, following Auguste and Jacques Bouchayer, that the initiation of iron production should be attributed; this resulted from the use of hydraulic power and the invention of a modern method of iron smelting, namely the blast furnace process, in the Alpine mountain streams of the Allévar region (Bouchayer, 1956, p. 147; Bouchayer, 1984, pp. 198–199). However, during this period, water power was mainly used to operate water hammers (martinets), with the help of which various items for military, agricultural and domestic use were manufactured from molten iron (French: *fer fondu*) – rather than from pure cast iron, which would appear later. Bouchayer mentioned one of the charters of the rural liberties – the Bressieux Charter (French: *Bressieux*) – where as early as 1288, terms such as ‘steel ball’ (French: *balle d’acier*), iron plaque or semi-finished product (French: *carreau*), and, particularly tellingly, ‘cacabus’ – a cast-iron pot, a kind of saucepan, which was hung on a hook attached to a chain in rural fireplaces (Bouchayer, 1956, p. 148).

Fireplace plaques from the monastic religious communities and parishes in Franche-Comté in the mid-16th century (Plaques de cheminée des congrégations religieuses monastiques). People from different walks of life could afford them in the later stages of the use of cast-iron fireplace plaques in Franche-Comté. It is evidenced by the recorded instances of unauthorised use or even the appropriation of the heraldic symbols on the plaques by individuals, who did not hold the noble status. This phenomenon is evidence of the social prestige of heraldic decoration and of wealthy townspeople or the bourgeoisie’s desire to align themselves with the noble milieu visually. At the same time, in the 16th century, the commissioners and owners of cast-iron stone slabs remained predominantly wealthy noble families and the numerous abbeys of Franche-Comté, which determined the elitist nature of this type of material culture in its early period.

There were two cast-iron fireplace plaques from Franche-Comté, executed in the Gothic style in the form of a semi-circular pediment, which belonged to a type known as ‘stove doors’ (French: *les portes du fourneau*).

There was no coincidence in the term “stove doors”, which was used to describe this form of the fireplace plaque. The fireplace gradually began to “compete” with the oven, a heating system characteristic of the German tradition, from the beginning of the 16th century, in the castles and palaces of Franche-Comté. The references to the stoves appeared in the region’s written sources, particularly in the Upper Saône, as early as the reign of Emperor Charles V. By the end of the 17th century, the stove – constructed from brick, earthenware, cast-iron plaques or tin – was increasingly recorded in inventory descriptions, primarily in castles and town mansions, where it was installed in salons and dining rooms. It was only in the last third of the 18th century that the stove became more accessible to the craftsmen and the peasants; however, for the poorest sections of the population, the open hearth remained the main source of heating, despite the climatic challenges (Vernot, 2018, pp. 3–4).

Next, we should study two fireplace plaques that symbolically mark a kind of conclusion to the era of Emperor Charles V. One of them dates from 1555, the year of Emperor Charles V’s abdication in favour of Philip II (Fig. 10); the other to 1558, when Charles V died (Fig. 11).



Fig. 10. Semi-circular fireplace plaque (1555). Private collection – Claude Augustin

A semi-circular fireplace plaque featuring a 'simple' St. Andrew's Cross (Fig. 10) – a symbol of the dynastic heritage of the Dukes of Burgundy and their successors, the Habsburgs, which Charles V began to use particularly actively, as well as a measure of the national identity of the Comté (see, in particular, Vernot, 2002, pp. 13–66; Vernot, 2009, pp. 100–101). The plaque originated from an old large farm in Frasne-le-Château, in the department of Haute-Saône. It was made in 1555. The plaque was cast from a wooden mould composed of four planks, to which separate carved elements were attached: a large St. Andrew's Cross, four smaller crosses and two balusters (dimensions: height – 96 cm, width – 94 cm, thickness – 3 cm, weight – 113 kg). The tops of the columns feature slightly chiselled anthropomorphic masks resembling Native American mascarons.



Fig. 11. Part of a fireplace plaque (1558)

Source: Private collection, Charles Nijman Fireplace Antiques.

A fireplace plaque dated 1558 was discovered in a private collection in the Netherlands. Origin: blast furnaces of Upper Sona. Dimensions: height – 96 cm (?) (taking into account the

missing lower section), width – 94 cm, thickness – 2 cm. The original weight may have been around 100 kg. Its reconstruction is based on a comparison with the similar fireplace plaques from Franche-Comté of the same period, made in the form of the so-called 'stove doors', which survived to the present day in good condition. Their dimensions may have varied by a few centimetres, suggesting they originated from the same foundry or that standardised moulds typical of that era were used.

For example, there are fireplace plaques from Franche-Comté dating from the mid- to late 16th century (Fig. 12).



Fig. 12. 1) A fireplace plaque with a Latin cross and a globe in a church – a notable example of religious symbolism, combining a heraldic motif (the cross) with an architectural composition. Dimensions: 0.94×0.96 m.

2) A plaque with columns and a pediment in the form of a temple – stylistically concise, executed in the shape of a 'stove door', with balusters on the sides and a simple triangular pediment at the top, interpreted as a symbol of protection for the family hearth. Dimensions: 0.93×0.93 m; thickness: 4 cm. Photo: Claude Augustin

The 1558 fireplace plaque is of particular interest to the researcher. In its upper part, within the triangle symbolising a temple, there is a classical shield with a cross, which prevents it from being classified as a single type: it could be a 'moline cross' (French: *croix moline*). This type of cross takes its name from the French word *moulin* – "mill". It is associated with the shape of the "prongs" at the ends of the cross, which resemble mill blades or the fastenings of mill mechanisms. Another common interpretation links it to mill keys, which had a similar forked shape. This cross is also known as the anchor cross or "moored cross" (French: *croix ancrée*), which is a variant of the heraldic cross. At the same time, the "Molina Cross" frequently appears in the coats of arms of many Cistercian abbeys and is a particularly fitting emblem for the Order of Saint Bernard (de Sorval, 2003, pp. 117–118; Froger, 2012, pp. 53–58). The key figure of this order, a dominant figure in Western Christianity, was Bernard of Clairvaux (1090 – 1153), a native of the Burgundy–Franche-Comté region, who founded Clairvaux Abbey in Champagne.

The Cistercians had an extensive network of daughter monasteries in the Kingdom of France and beyond, with large landholdings; some monasteries even operated blast furnaces and forges. The fireplace plaque from 1558 was most likely used in the hall of one of the abbeys in the modern departments of Haute-Saône or Jura in Franche-Comté

(the Abbey of Bellevaux (Fr. Abbaye de Bellevaux), Cherlieu (French: Abbaye de Cherlieu) in Haute-Saône, Abbaye d'Acéy in Jura, and others); as well as the Maltese cross (Nisbet, 1816, Vol. 1, pp. 113–117).

We can spot the intertwined roots with two shoots between the two sets of five on the plaques – an image of the tree of life, which was one of the favourite motifs in Renaissance art and painting, as well as an important element of the heraldic symbolism (Froger, 2012, p. 83). There are two shoots with the leaves and roots, depicted in the centre, represent a vine – a common symbol of the nobility, fertility, fidelity and courage in the Gothic and Renaissance art. Similar motifs are frequently found on the façades of the Gothic cathedrals in Burgundy and Lorraine, and, in particular, on cast-iron fireplace plaques.

Both fireplace plaques from 1555 and 1558 (Figs. 10 and 11) depicted two fluted columns, which in Franche-Comté combined the historical, geographical and political meanings. First and foremost, this is a reference to the ancient columns: they appear on the coat of arms of Besançon, recalling the Roman structures that once stood on the site of the modern Vauban citadel, some of which survived in the old town. These columns are likely to be the remains of the Roman temples or monuments, emphasising Besançon's status as a key hub in the Roman Empire's road network. This interpretation is reinforced by the presence of the Roman road that linked Geneva and Besançon.

Cast iron fireplace plaques often conceal many mysteries that modern scholars must correctly interpret. For instance, during the initial analysis of a plaque bearing the date '1558', the year was misidentified: due to the absence of the final digit (a casting defect?), the vine branch was initially mistakenly interpreted as an intertwined '9' or '6'. It was only owing to the consultations with Professor Philip Palazi, who suggested that the fireplace plaque was indeed missing the last digit (letter from Prof. Philip Palazi to the author), and following a thorough analysis, that the barely visible outlines of the embossed number "8" were discovered.

There is a depiction of a head, which was probably intended to resemble a cherub, at the bottom, along the edge of the cut-off fragment. Imprints of a crowned cherub with outstretched wings are frequently found on Lorraine fireplace plaques from the end of the 16th to the beginning of the 17th centuries. For example (Fig. 13), a fireplace plaque bearing the coat of arms of the Duchy of Lorraine from the end of the 16th or the beginning of the 17th century.

On the other hand, this is an atypical cherub. By analogy with the German tradition of the Rhine Valley from the same period, where the cast-iron fireplace plaques depicted Emperor Charles V, noble dignitaries or townspeople in medallions, local masters of the foundries – the comtois – depicted the image of a patron saint. This is a symbol of the cultural identity of Franche-Comté, as well as Burgundy and Auvergne – the image of the local patron saint of winemaking, Saint Vernier or Saint Werner (Fig. 14) (French: Saint Vernier / Saint Werner, a localised form of veneration of Saint Werner in Franche-Comté).

The cult of Saint Vernier was brought from Trier, developed in Auvergne and flourished in the County of Burgundy after 1428. It was then, in Besançon, that the first brotherhood of Saint Vernier was established (Henri de Grèzes, 1889, XVIII, p. 121). There grew in popularity veneration of the saint in the region with each passing year. In 1548, a portion of the saint's relics was brought to Besançon, where they were solemnly displayed at Easter. From then on, these relics were kept and venerated in the collegiate church of St Mary Magdalene until the French Revolution of 1789. The second Tuesday after Easter was established in

Franche-Comté as the official feast day of Saint Vernier. In the iconography found in the churches of Franche-Comté, Burgundy and Auvergne, the saint is depicted as a young man, usually wearing a simple, flat-topped felt hat (French: *chapeau de feutre plat*) (Henri de Grèzes, 1889, XVII–XVIII, XXIII, p. 122). The outline of the figure at the bottom of the 1558 slab clearly defines a round, flat crown and moderately wide brims that slope slightly downwards – precisely the shape characteristic of flat felt hats worn by saints, pilgrims or winegrowers in Burgundy and Franche-Comté in the 15th – 16th centuries.



Fig. 13. Fireplace plaques from the end of the 16th – beginning of the 17th century. Lorraine. Dimensions: width 66 cm, height 61 cm, depth 4 cm, weight 59 kg

Source: Claude Augustin.



Fig. 14. Statue of Saint Vernier in the church of Souvigny-Sainte-Marthe (Puy-de-Dôme department, Auvergne-Rhône-Alpes region)

Source: roch-jaja.nursit.com

The image of Saint Vernier on the plaque is placed between two columns in a temple niche, symbolising his patronage over the family homestead – as a holy martyr and patron of winemaking. Several fireplace plaque depicting this saint survived to the present day, which only highlights the particularly reverent attitude towards him in a number of regions. There is depicted the head of the patron saint without any additional ornamentation on another plaque (Fig. 15), which may originate from the metallurgical valley of Ouch or the Ozerain valley (French: Ozerain).



Fig. 15. Fireplace plaque depicting a young man resembling St. Vernier. Origin – the Ouches Valley (?), Duchy of Burgundy, c. 1620 – 1630s.

Source: leboncoin.fr. Found in Vitteaux (Côte-d'Or department).

In 1595, Franche-Comté was invaded by the French troops of Henry IV, resulting in the destruction of many forges, bridges and roads. The exact number of forges and blast furnaces that were destroyed or ceased production is unknown. The following forges were destroyed during the military campaigns: Bley, Cugney, Estravaux and Echalong. The restoration of old forges and the establishment of new metallurgical production centres in Franche-Comté took place between 1598 and 1634, during the reign of Archdukes Albert and Isabelle (Delsalle, 2002, pp. 249–266).

A parish fireplace plaque dating from 1616. Another parish fireplace plaque (Fig. 16), dated 1616, was found in the municipality of Avanne (French: d'Avanne), located six kilometres from Besançon, in the Doubs department (at that time – the bailiwick of d'Amont, district of Vesoul). A preliminary analysis of the plaque suggests that it bears the coat of arms of the priest, who served as the parish priest of the village of Avanne during that period. It should be noted that the old parish church, where he served, was frequently damaged by floods and was replaced by a new one in the first third of the 19th century.

The fireplace plaque was preserved in its original fireplace in the former parish house (French: cure), having likely stood there for over four centuries.



Fig. 16. Fireplace plaque bearing the coat of arms of Jean Brury, parish priest of the village of Avann, Order of Malta. Dimensions: height 102 cm, width 91 cm, depth from 1.2 cm to 3.5 cm. Weight 137 kg. Private collection

Source: Claude Augustin.

The compositional design of this fireplace plaque is based on a simple motif of a sphere with a Jerusalem Cross. The oval coat of arms, crowned with a cross, clearly emphasised the patrons religious status. It was indicated by the characteristic details of the coat of arms: the flower on a stem in the lower left field, as a symbol of faith and protection, evoked associations with the Order of Malta as the “flower of Christianity”. According to Cesare Magalotti (It. Cesare Magalotti), the Order of St John of Jerusalem is “...a sacred and ecclesiastical Republic, composed of the flower of the most select and distinguished nobility of the entire Christian world” (c. 1635) (Buttigieg, & Caruana, 2018, p. 73). Three small rodents – rats (or mice), arranged horizontally in a row, are also a characteristic feature of the priest’s coat of arms, which we find, in particular, in d’Ozier’s armorial (Fig. 17). The surname Radiguet may have had the older form Rattiguet in the 17th century, which explains the choice of rats for the coat of arms in accordance with a play on words involving the bearer’s surname.



Fig. 17. The coat of arms of Martin Radiguet, parish priest at Courtille, Generalate of Tours, France (Martin Radiguet, prêtre curé à Courtille)

Source: Hozier Ch. BnF. Ms. 32261, Tours, II, p. 897.

In the 16th and beginning of the 17th centuries, during the Spanish rule, the parish of Avann – one of the closest to Besançon – was under the patronage of the Temple/Commandery of Saint John of Jerusalem in Besançon, which belonged to the Order of Malta (Temple de Saint-Jean de Jérusalem) (Delsalle, Gauzente, p. 161). Historically, however, dating back to the period of the unified and independent Duchy of Burgundy – from the 15th century until 1723 – the seigneurie of Avann belonged to the renowned French family d’Aumont (French: d’Aumont) (BM (Besançon), MS 949, pp. 39, 79). During the French military campaign in Franche-Comté in 1636, it was the Duke d’Aumont, who acted as the patron of this village (as of 1636, this refers to Duke Antoine d’Aumont de Rochebaron, 1601 – 1669).

Hence, the church in the village of Avanne belonged to the Order of St John of Jerusalem – one of the few military-monastic orders in Europe that held sovereign status, recognised by the Pope and the Empire (ADD (Besançon). Avanne, Parish Registers. Vol. 1629 – 1697: 1; BM (Besançon), Ms 949, p. 79). The Order of Malta, as is well known, had the right to establish its own internal nobility (French: chevaliers de justice), to issue patents of ennoblement within its territory (primarily in Malta, Rhodes, Cyprus and certain provinces of the Order), and to confirm the noble status of candidates through the procedure of *preuves de noblesse* (proofs of nobility). It was precisely the Order’s system for reviewing the applications for the nobility from the potential members that may have inspired Louis XIV to issue, between 1664 and 1715, a series of decrees concerning the statutes of the nobility in France; similarly, the Bourbon governments in Spain and the Habsburg governments in Austria introduced similar procedures in the 18th century (Buttigieg, Caruana, 2018, p. 73).

In July 1615, Jean Brury (?–1629?) was appointed parish priest of the village of Avanne (ADD (Besançon). Avanne, Parish Registers. Vol. 1552 – 1632, p. 120). Louis de La Roque does not include the surname Brury in his register (armorial) of the Knights of Malta, but the author himself acknowledges that his list, containing some 15,000 surnames, is only partial. Diverse titles of the Order of Malta were burned following its dissolution in France in September 1792 (La Roque, 1891, XXIII–XXIV). This fireplace plaque was likely cast to mark the appointment of a Hospitaller priest to the parish as early as 1616, when seasonal work at the blast furnaces and foundries began.

Neither the church/commandery of St John of Jerusalem in Besançon nor the parish church in the village of Avanne, which was under the patronage of the Maltese, has survived to the present day. History has also erased much information about the coats of arms, so the reconstruction of this and similar heraldic stone slabs can contribute to the preservation and restoration of the regional history and culture. Due to the arrival in 1629 of a new priest, Antoine Girard, at the parish of Avanne, the plaque remained in the parish house and, over the years, became an integral part of the partially lost history of the village, which was part of the Besançon conurbation, for all subsequent priests.

In general, the researchers paid little attention to the stone slabs bearing the coats of arms of the parish priests, who were presumably few in number. At the same time, the role of the parish priest during times of famine, disease, epidemics and wars (particularly during the Thirty Years’ War or the Great Famine of 1693–1694) was crucial. They were the only ones, who constantly came into contact with the dying and could recognise the symptoms of disease; they also recorded deaths in parish registers, and thus became the ones who left an important part of statistical and demographic information for future generations (Lachiver, 1991, p. 169).

The hearth slabs of Franche-Comté, which resembled “stove doors” in shape and, in their proportions and outlines, drew on the Gothic tradition, remained a sought-after product

of local foundries virtually until the active phase of the Thirty Years' War in the region (until 1636). In 1636, the authorities of Franche-Comté likely did not manage, at the outset of hostilities with France, to destroy all the smithies and foundries to prevent them from falling into the hands of Richelieu's and Prince Condé's troops and being used during the siege of the county's fortified towns. The last "peacetime" fireplace plaque, cast shortly before the outbreak of hostilities in 1636, was discovered in a farm building in the village of Rainans, situated near Besançon, then the capital of Franche-Comté, and close to the border with France (AMC (Besançon). Rainans (Jura)).

Following the devastation of the Thirty Years' War, which caused significant human and economic losses in Franche-Comté, craftsmen generally abandoned rounded forms, gradually shifting to rectangular designs that conquered local and almost all regional markets in France with confidence. At the same time, Besançon columns or balusters almost always remained their constant feature. In the 1670s – 1680s, Comtois fireplace plaques of a Gothic, rounded shape were still being produced in individual foundries (Fig. 18); the latest known stone slabs of this type dated from 1738 (AMC (Besançon): Andelot-en-Montagne (Jura)). Thus, with the disappearance of these types of fireplace plaques from production, a part of the region's iron-casting tradition, which had originated as early as the beginning of Habsburg rule, faded into oblivion.



Fig. 18. Fireplace plaque, 1680. Found in Lavernay (R. Lavernay, Doubs). Besançon Citadel (Coll. Musée Comtois). Dimensions: height 80 cm, width 79 cm, depth 1.7 cm. Photo by the author

Conclusions. The fireplace plaques of Franche-Comté constitute a unique material source that combines religious (apotropaic), political, and domestic symbolism. The Cross of St. Andrew served a protective function whilst also emphasising the national identity of the Comtois; the globus cruciger was primarily interpreted as a symbol of Christ's dominion over the world rather than exclusively as a Carthusian symbol. The monasteries (the Cistercians and, to some extent, the Carthusians) were the pioneers of mass production, but direct attribution of the plaques is possible only where a complete heraldic ensemble is present. The production of the fireplace plaques correlates clearly with periods of peace

and economic prosperity and ceased entirely during wars (for example: 1595, 1636 – 1650). There was presented the elite nature of early fireplace plaques (commissioned by the nobility, abbays and parish priests) and highlighted their value for the preservation of the cultural heritage of Franche-Comté and for a broader study of European material culture of the 16th – 17th centuries in the study.

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Yaroslav LYSEYKO

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

ORCID: 0000-0003-3404-7221

ResearcherID: L-9341-2016

Mykola HALIV

PhD hab. (Education), Professor, Department of Ukraine's History and Law, Drohobych Ivan Franko State Pedagogical University, 24 Ivan Franko Street, Drohobych, Ukraine, postal code 82100 (halivm@yahoo.com)

ORCID: 0000-0001-7068-3124

ResearcherID: F-3855-2018

Scopus ID: 57212151942

Ярослав ЛИСЕЙКО

кандидат історичних наук, доцент кафедри історії, музеєзнавства та культурної спадщини Національного університету “Львівська політехніка”, вул. Митрополита Андрія, 5, корпус 4, індекс 79016, Україна (lyseyko@gmail.com)

Микола ГАЛІВ

доктор педагогічних наук, професор, професор кафедри історії України та правознавства, Дрогобицький державний педагогічний університет імені Івана Франка, вул. Івана Франка, 24, м. Дрогобич, Україна, індекс 82100 (halivm@yahoo.com)

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THE TATAR RAID INTO LVIV LAND IN 1629

Abstract. In the article there has been conducted a detailed analysis and reconstruction of the events of the last large-scale Tatar raid into Lviv Land in the first third of the 17th century, which took place in September – October 1629. **The purpose of the research** is to carry out a historical reconstruction of the 1629 Tatar raid on the Lviv Land based on a comprehensive analysis of Lviv Grodsky Court records, to determine the geography of the raid's spread, and to study the scale of the socio-economic damage caused. **The methodology of the research** is based on the principles of scientific criticism and historicism, as well as on the use of general scientific (analysis, synthesis, generalization) and specialized historical (historical typological, historical systemic, quantitative, microhistorical) methods. **The scientific novelty** consists in the identification of the settlements of Lviv Land destroyed and affected by the Tatar attack of 1629, and the calculation of the scale of the damage based on a massive array of previously little-studied act materials from Lviv Grodsky Court. **Conclusions.** The Tatar raid of 1629 is considered not only as a military operation but as a profound destabilizing factor

that caused long-term changes in the socio-economic and demographic landscape of the region. In the study there has been reconstructed the chronology and geography of the advancement of the Tatar detachments numbering 7–8 thousand warriors under the command of Devlet Giray and Kantemir Murza. It has been determined that due to a high mobility and the lack of effective counteraction by the Crown troops, the Horde managed to encircle Lviv in a semi-circle, devastating settlements from the towns of Yavoriv and Horodok in the west to Zolochiv and Kozova in the east. The chief focus has been on the strategy of the invaders, which was aimed at capturing human resources (yasyr) and the purposeful destruction of infrastructure to undermine the economic potential of the region. In the study there has been put a particular emphasis on studying the source potential of Lviv Grodsky Court acts (oaths (juramentum), reports (relations) and manifestations). It has been calculated that even two years after the raid, the amount of tax shortfall was 41% for the rural areas and 27,7% for the towns, while the process of farm reconstruction in many cases lasted for over decades.

Keywords: Tatar raids, Tatars, Lviv Land, destructions, oaths.

ТАТАРСЬКИЙ НАБІГ НА ЛЬВІВСЬКУ ЗЕМЛЮ 1629 р.

Анотація. Стаття присвячена детальному аналізу та реконструкції події останнього масштабного татарського набігу на Львівську землю у першій третині XVII ст., що відбувся у вересні-жовтні 1629 р. **Мета дослідження** – на основі комплексного аналізу матеріалів Львівського гродського суду здійснити історичну реконструкцію татарського набігу 1629 р. на Львівську землю, визначити географію поширення набігу та дослідити масштаби заподіяних соціально-економічних збитків. **Методологія дослідження** базується на принципах наукової критики, історизму, а також на використанні загальнонаукових (аналіз, синтез, узагальнення) та спеціально-історичних (історико-типологічний, історико-системний, квантативний, мікроісторичний) методів. **Наукова новизна** полягає в ідентифікації знищених та постраждалих в результаті татарського нападу 1629 р. населених пунктів Львівської землі, підрахунку масштабів завданих збитків на основі масиву раніше малодосліджених актових матеріалів Львівського гродського суду. **Висновки.** Татарський набіг 1629 р. розглядається не лише як військова операція, але і як глибокий дестабілізаційний фактор, що спричинив довготривалі зміни в соціально-економічному і демографічному ландшафті регіону. У дослідженні відновлено хронологію та географію просування татарських загонів чисельністю 7–8 тисяч воїнів під командуванням Девлета Геря та Кантемира мурзи. Встановлено, що завдяки високій мобільності та відсутності ефективної протидії з боку коронних військ ординцям вдалося взяти Львів у фактичне півкільце, спустошивши поселення від містечок Яворова та Городка на заході до Золочева та Козової на сході. Особливу увагу присвячено стратегії нападників, яка була спрямована на захоплення людського ресурсу (ясиру) та цілеспрямоване нищення інфраструктури для підризу економічного потенціалу регіону. Окремий акцент у роботі зроблено на вивченні джерельного потенціалу актів Львівського гродського суду (юраментів, маніфестацій та реляцій). Розраховано, що навіть через два роки після нападу сума недобору податків становила 41 % для сільської місцевості та 27,7 % – для міст, а процес відбудови господарств у багатьох випадках розтягнувся на десятиліття.

Ключові слова: татарські набіги, татари, Львівська земля, знищення, юраменти.

Problem Statement¹. The first third of the 17th century was marked by a series of devastating Tatar raids to the Ruthenian Voivodeship of the Polish-Lithuanian Commonwealth at that time. There were at least 13 Tatar raids during that period: in 1605, 1607, 1612, 1615, 1617, 1618, 1620, 1621, 1622, 1623, 1624, 1626 and 1629, hence, Lviv land of the Ruthenian Voivodeship suffered (Horn, 1964, pp. 12–13). The objects of the attacks were most often

¹ The article was written within the framework of the research project “Military Destruction in the Polish-Lithuanian Commonwealth in the 17th Century: A Comparative Analysis of the Phenomenon in the Regions of Red Ruthenia and Greater Poland from an Economic Perspective” (Zniszczenia wojenne w Rzeczypospolitej w XVII wieku: analiza porównawcza zjawiskana obrzeżach Rusi Czerwonej i Wielkopolski w perspektywie gospodarczym XVII wieku), carried out at the Tadeusz Manteuffel Institute of History. The research was funded by the National Science Centre (Poland) under the “Sonata Bis 6” programme, based on decision no. DEC-2016/22/E/HS3/00479.

villages, less often towns and cities, which were more difficult to capture. The Tatars were most interested in human resources – the capture of the slaves, who could later be sold at the slave markets. The infrastructure and network of settlements were also purposefully destroyed in order to undermine the economic potential of the Polish-Lithuanian Commonwealth. As a result, regular Tatar attacks brought devastation, depopulation and economic decline. In the case of Lviv land of the Ruthenian Voivodeship, the territory of the Tatar raids, their chronology and the scale of the destruction inflicted are amenable to historical reconstruction. The local population in order to further avoid taxation, turned to Lviv Grodsky Court with numerous oaths (the so-called *juramentum*), manifestations and reports about the damage caused by the Tatar raids. Such documents are particularly well preserved concerning the Tatar raids of the 1620s, in particular for the raid of 1629 – the last in a series of raids into the Ruthenian Voivodeship in the first third of the 17th century.

Review of Sources and Recent Research. The topic of research on the Tatar raids into the Ukrainian lands in general and specifically into the territory of the Ruthenian Voivodeship of the Polish-Lithuanian Commonwealth is not new. Numerous scholars, for example, Mykhailo Hrushevskyy (Hrushevskyy, 1907/1993, pp. 326–337; Hrushevskyy, 1909/1995, pp. 21–40) and Ivan Krypiakievych (Krypiakievych, 1991, pp. 162–168) provided a general description of this phenomenon. During the Soviet period, the issue on the Tatar raids into the Ukrainian lands was covered in the articles written by Yaroslav Dzyra (Dzyra, 1971, pp. 83–102), Mykyta Dumka (Dumka, 1970, pp. 114–117), but the Polish historian Mauritsii Horn studied this phenomenon in the most detail. Based on the material of the Grodsky and Zemsky courts of the Ruthenian Voivodeship, he reconstructed in detail not only the chronology and geography, but also the economic consequences of the Tatar attacks of the first half of the 17th century, their impact on demography, settlement development, trade and production (Horn 1962; Horn 1963; Horn 1964). Yaroslav Dashkevych focused on the issue on the Tatar raids due to its relevance and the fact that it wasn't covered enough in the early 1990s. He offered new approaches to the classification and methodology of calculating losses, primarily *yasyr* (Dashkevych, 1993, pp. 40–47). However, since then, the study on the Tatar raids in Ukrainian historiography has not progressed much and rarely goes beyond the format of the individual scientific articles. The issue on the Tatar attacks are currently covered by Ivan Tymiv (Tymiv, 2016, pp. 29–42; Tymiv, 2015, pp. 13–18; Tymiv, 2017, pp. 3–19), Władysław Hrybovskyy (Hrybovskyy, 2000, pp. 206–211), Yuriy Mykhailiuk (Mykhailiuk, 2010, pp. 136–139), Oleksandr Halenko (Halenko, 2003, pp. 52–68), and Yaroslav Lyseyko, Ihor Smutok, Mykola Haliv, Vasyl Ilnytskyi (Smutok, Ilnytskyi, & Haliv, 2024, pp. 258–269; Lyseyko, Haliv, & Ilnytskyi, 2025, pp. 129–140). In the Polish historiography Andrzej Gliwa studied the issue on the Tatar raids the most thoroughly. The focus of his scientific interests was the attacks on Przemyśl land primarily. The scholar convincingly showed that the materials of the Grodsky and Zemsky acts had significant source potential and make it possible to reconstruct the geography, chronology and scale of destruction caused by the Tatar invasions at the local level (Gliwa, 2013; Gliwa, 2016, pp. 703–735).

The purpose of the research is based on a comprehensive analysis of the materials of Lviv Grodsky Court, to carry out a historical recreation of the Tatar raid of 1629 on Lviv land, determine the geography of the raids' spread, and study the scale of the socio-economic damage caused.

The Research Results. The last major Tatar raid of the first third of the 17th century on Lviv land took place in September-October 1629. The reason for this raid was new Cossack

campaigns in the Crimea. Particularly painful for the Crimean Tatars was the July 1629 expedition of 4 thousand Cossacks to Gezlev, the only port of the Crimean Khanate, where the Cossacks burned the suburbs (Brekhunenko, 2007, p. 62).

King Sigismund III warned of the possibility of the Tatar raid on June 16, 1629, and already on June 19, the monarch announced the first calls for the convocation of the Commonwealth movement (CSHAUL, f. 9, d. 1, c. 380, pp. 3074–3075, 3094–3095; Horn, 1962, p. 54). The Bratslav cornetmaster Stefan Chmielecki regularly informed about the invasion of the “*wojska Tatarskiego niemala potęga*” in his letters dated on June 25, July 1, September 8 and 23, 1629 (CSHAUL, f. 9, d. 1, c. 380, pp. 3072–3073, 3074–3075, 3430–3431, 3468–3469).

The Crimean and Budzha Tatars prepared for a major campaign, which later reached the territory of Lviv land after minor skirmishes and the Tatar raids in the summer of 1629, in August. On September 9, the Ruthenian voivode Stanislav Lubomirsky summoned the nobility to his convoy near Zhabince on the Zbruch River in the Galician land (CSHAUL, f. 9, d. 1, c. 380, pp. 3419–3420). On September 19–20, 1629, the Tatars invaded the territory of the Polish-Lithuanian Commonwealth via the Kuchma route. However, on September 23–27, they carried out an unusual maneuver, entering the territory of Moldavia, and from there on September 27–28, they continued their campaign into the territory of the Polish-Lithuanian Commonwealth. The Tatar forces numbered 7–8 thousand soldiers. The Budzha Tatars were led by Kantemir Murza, and the Crimeans and the entire expedition were commanded by Devlet Gerei (Gliwa, 2013, pp. 145–146). The Tatar detachments were divided into two groups. The first group was supposed to enter the territory of Przemyśl land. The second group of the Tatar troops under the command of Sefer Gerei Soltan and Selamet Gerei Soltan was to operate in the territories of Lviv land and Belz Voivodeship. The Tatars moved quickly, which is why the crown detachments of Stefan Khmelnytskyi and Stanislav Lubomirsky, who were near Żabyntsy above the Zbruch, could not oppose them. The Tatar detachments began to operate directly in Lviv land in the last days of September – at the latest on October 1, 1629 (Gliwa, 2013, p. 147).

The entire Lviv land was devastated, only the territories north of Lviv in the direction of Zhovkva and Kamiianka-Buzka suffered relatively little. As an exception, in the very north of Lviv land, near the borders with Busk land, the town of Toporiv and the village of Stovpin, which the Tatars could enter from the north, suffered from the Tatar raid (CSHAUL, f. 9, d. 1, c. 382, p. 1353; c. 358, p. 136; c. 357, pp. 317–318). There were devastated the villages to the west of Lviv, in the vicinity of the town of Horodok – Cherliany, Doliany, Bratkovychi (CSHAUL, f. 9, d. 1, c. 357, p. 311; c. 381, pp. 85, 108). The town of Horodok was damaged by the Horde (CSHAUL, f. 9, d. 1, c. 382, p. 1353). Along the route towards Mostyska, near the administrative border with Przemyśl Land, the Tatars devastated Rodatychi and Tuchapy (CSHAUL, f. 9, d. 1, c. 381, pp. 73, 90–91). The town of Yavoriv was devastated the most northwestern point of Lviv Land (CSHAUL, f. 9, d. 1, c. 382, p. 1353).

The Tatars destroyed villages on the border with Przemyśl land near the town of Rudky in the southwestern outskirts of Lviv land, on the left bank of the Dniester. There is information about the destruction of the town of Rudky, as well as the nearby villages of Pidhaichyky, Vistovychi, Novosilky Hostynni in Lviv Grodsky Acts (CSHAUL, f. 9, d. 1, c. 357, pp. 337–338). On October 1, 1629 the Tatars were in this area – they were several hundred horsemen of the Budjak (Budzha) Tatars under the leadership of Salman Shah Murza (Gliwa, 2013, p. 147). Further east of Rudky, near the town of Komarno, the Tatars destroyed the village of Klitsko, which indicates a plundering operation on the left bank of the Dniester and further

downstream (CSHAUL, f. 9, d. 1, c. 357, pp. 331–332). The Tatars “*z gruntu*” burned the town of Shchyrets with the nearby villages of Lany and Horozhanka to the east of Komarno (CSHAUL, f. 9, d. 1, c. 381, pp. 387, 88; c. 357, p. 338).

We have only sporadic news about the devastation in Zhydachiv povit. It is explained by the fact that the act books of the Zhydachiv Grodsky Court for the first half of the 17th century are lost. It is known that the Tatars attacked the city of Zhydachiv, destroyed the village of Ruda south of this city and were also in Dolynsky starostvo, where they devastated the village of Yakubiv (CSHAUL, f. 9, d. 1, c. 385, pp. 940–945; c. 357, pp. 294, 320–321).

The most severe devastation in Lviv land was suffered by settlements to the southeast of Lviv. It was a chain of estates on the way from Berezhany in the direction of Svirzh, Bibrka and Davydiv, as well as from Bibrka north to Kurovychi and Borshchovychi. There were devastated numerous villages from the south of Peremyshliany town, on the left bank of the Hnyla Lypa River, for example, the villages of Brykun, Pletenychi, Poliukhiv, Pniatyn, Podusiv and Dusaniv near Firleiiiv, already at the southeastern border of Lviv land (CSHAUL, f. 9, d. 1, c. 358, pp. 117, 125; c. 357, pp. 298, 296). The Tatar detachments devastated the villages of Ostalovychi, Utikhovychi and Tuchne on the right bank of the Hnyla Lypa River, also south of Peremyshliany (CSHAUL, f. 9, d. 1, c. 358, pp. 317, 136, 128–130). The Tatars destroyed the village of Hlibovychi near the town of Svirzh, and in the direction of Bibrka – Stoky (CSHAUL, f. 9, d. 1, c. 358, pp. 128–130; c. 386, pp. 1219–1220). The town of Bibrka was attacked (CSHAUL, f. 9, d. 1, c. 382, p. 1353). There were devastated the villages of Repekhiv, Trybokivtsi, Bakivtsi, Chyzhychi to the south of Bibrka, to the west – Sukhodil and Lopushna (CSHAUL, f. 9, d. 1, c. 357, pp. 294–296; c. 358, p. 133; c. 381, pp. 89–90). There were attacked the following villages: Pidmonastyr, Budkiv, Hryniv, Vidnyki, Zvenyhorod, Sholomyn and Zubra from Bibrka in the direction of Lviv. The Tatars burned down half a hundred houses in Lviv (CSHAUL, f. 9, d. 1, c. 357, pp. 295–297; CSHAUL, f. 9, d. 1, c. 381, pp. 87–90). In the end, the Tatars even devastated Lviv suburbs, which is also mentioned in the Act books (CSHAUL, f. 9, d. 1, c. 382, p. 1353).

The destruction was particularly severe east of the axis between the towns of Bibrka and Hlyniany, actually along the road leading to Busk. There were affected the following settlements: Volove, Romaniv, Selyska, Hanachivka, Pid’yarkiv, Horodyslavychi, Pidsosniv, Solova, Kurovychi, Pecheniya, Hermaniv (nowadays – Tarasivka), Zhuravnyki, Vyzhniiani, Rozvoriany; east of Hlyniany – the village of Perekhoiv (CSHAUL, f. 9, d. 1, c. 381, p. 82; c. 357, p. 294; c. 358, pp. 118–124, 129–131, 134–135). The northern part of Lviv land suffered little in the Tatar attack of 1629. There is a note about the devastation by the Tatars of Liashky Murovany (nowadays Murovane) on the northern outskirts of Lviv and the village of Borshchovychi 18 km northeast of Lviv (CSHAUL, f. 9, d. 1, c. 358, pp. 128–129, 132). (The geography of the devastation confirms that the Tatars actually took Lviv in a semicircle, operating not only from the south, but also breaking through to the northern outskirts (the tract to Belz and Zhovkva)).

Apparently, the Tatars moved to the south, from Brody side towards Zolochiv after the operation in Belz land. The furthest point in the north-east of Lviv land, where the Tatar destructions are recorded, was the village of Dub’ye (CSHAUL, f. 9, d. 1, c. 381, p. 90) 12 km south of Brody. There were destroyed the villages of Khylychty, Bonyshyn, Zalissia, Liatske Velyke (nowadays Halytske), Belzets (nowadays Honcharivka) in the vicinity of Zolochiv (CSHAUL, f. 9, d. 1, c. 358, pp. 122–124, 135, 317–318). Then the Tatars went south towards Zolochiv, destroying the village of Pidhiria along the way (CSHAUL, f. 9, d. 1, c. 358, pp. 122–124).

There were affected the town of Kozova, which was the southeastern point of the Tatar invasion in Lviv, further west was Berezhany, to the north of them the villages of Tseniv, Verbiv, Kuropatnyky, and Urman (CSHAUL, f. 9, d. 1, c. 358, pp. 118–119, 121, 126–127, 132–133; c. 383, pp. 1070–1073).

The culmination of the Tatar raid on the Ruthenian Voivodeship were the clashes between the Tatar detachments and the crown army on October 7 near Obelnytsia and Burshtyn on the Hnyla Lypa River and near the village of Ustia near the Dniester River in 1629. It was possible to destroy and disperse the detachments of the Crimean Tatar cavalry in the battles, which planned to cross with the loot to the right bank of the Dniester and join the rest of the troops of Devlet Girey and Kantymyr, who were already in Pokuttia at that time. The only Tatar detachment that escaped the trap prepared by the Polish military leaders near the fords on the Dniester was the cavalry of Salman Shah Murza. These Horde troops managed to bypass the crown units and safely retreated to Moldavia, moving near Kozlov and Ternopil, and on October 9–10, 1629, they were in the area west of Zalizhchyky (Gliwa, 2013, p. 148).

In general, it was possible to find information about 76 settlements in Lviv land that suffered from the Tatar attack in 1629, although in reality there were more. There were found 96 peasant oaths (juraments) about destruction related to this attack in the acts of Lviv Grodskyi Court. There was the information not only regarding Lviv land, but also the adjacent territories of neighbouring lands and Belhorod Voivodeship. It should be mentioned that there were filed only 25 of them in 1630 – 1631, i. e., relatively recently after the Tatar attack. The others were submitted to Lviv Grodskyi in large numbers much later – in 1633 – 1638. It indicates the difficulties that the peasants experienced in rebuilding their farms and the duration of the consequences of the Tatar attack, which sometimes could not be eliminated even after decades.

There were recorded the amounts of taxes that were collected from the peasants in the oaths (juraments) of 1635. There could be found a note quite often that there were “empty fields” in many villages after the Tatar devastation in the documents. The smallest amount recorded in the oaths – 4 zł 24 groszy – was collected from the village of Bonishyn, which belonged to Mykola Seniavsky (CSHAUL, f. 9, d. 1, c. 358, pp. 123–124). At the same time, even six years after the Tatar raid of 1629, there were settlements in Lviv land that did not receive any tax revenues at all. These included Kozova, Nedbalivka, Verbiv (in the share of David Svirzki), which indicated the significant scale of destruction and the complexity of restoring the farms (CSHAUL, f. 9, d. 1, c. 358, pp. 120, 122–124). The largest amount among the affected villages and towns – 120 zł in 1635 – was collected from the town of Toporiv, which was owned by Władysław Dominik Zasławski (CSHAUL, f. 9, d. 1, c. 358, p. 136). In general, according to our calculations, there entered 42 oaths on the payment of the levy into Lviv Grodskyi books in 1635, it was noted that the results of the Tatar raid and the destruction it caused had an impact on the amounts paid.

There was raised levy in Lviv land two years after the invasion of 1629. At that time, Lviv burgrave Severyn Kżykawsky was responsible for collecting taxes. There were collected 12,521 zł, 14 groszy, and 9 pennies from Lviv land, and the arrears amounted to 8,997 zł and 7 groszy. There were collected 9,150 zł, 19 groszy, and 9 penniazky from the cities and towns of Lviv land. Due to accidental fires and the destruction by the Tatars of Lviv suburbs, mills near Lviv, as well as the towns of Bibrka, Horodok, Yavoriv, Shchyrets, and Toporiv it was impossible to raise 3,506 zł, 7 groszy, and 9 penniazky (CSHAUL, f. 9, d. 1, c. 382, pp. 1350–1354). Taking into consideration the above-mentioned, the amount of the deficit was 41% for the rural areas and 27,7% for the cities.

The Tatar raid into Lviv land in 1629 was the last in a series of similar raids in the first third of the 17th century. The Tatars did not attack Lviv land in the 30s and 40s of the 17th century, which was explained by the struggle for power among the Tatar elites and the reorientation of the raids on Moscow Tsarstvo (Gliwa, 2013, p. 149).

According to the researched material, the Tatar raid of 1629 appears to have contributed to more than just the network of villages' destruction or demographic depopulation. It was a deeply destabilizing factor of the agrarian and tax economy, which forced communities to reconsider their survival models, and the estate owners to look for ways to rebuild and settle their ruined estates. In 1629, the Tatar troops numbering 7–8 thousand people under the leadership of Devlet Geray and Kantemir Murza used the tactic of rapid movement, which allowed them to avoid clashes with the crown army at the initial stage of the invasion. The attack covered mainly the western, southwestern, eastern and southeastern parts of Lviv land. In fact, the Tatars took Lviv in a "semi-circle" and even devastated the suburbs. The greatest concentration of destroyed settlements was to the southeast of Lviv.

The main goal of the attackers was to capture the yasyr (slaves) and destroy the infrastructure in order to undermine the economic potential of the Polish-Lithuanian Commonwealth. According to the records in the act books of Lviv Grodsky Court, there was achieved the above-mentioned goal. Mainly, the peasants turned there to testify to the scale of the destruction suffered in connection with the consequences of the 1629 raid. By doing so, they wanted to achieve exemption from taxation, or a reduction in the tax burden. The fact that the oaths submitted after the Tatar raid of 1629 often indicated the amount of taxes that needed to be collected and the amounts actually collected is a fairly accurate measure of the damage caused. In total, as a result of the 1629 raid, cities could not pay about 30% of the planned taxes, and villagers – about 40%, which indicates the catastrophic consequences of the Tatar raid on Lviv land. As a result, in many cases the process of rebuilding farms stretched over decades.

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Besim QERIQI

PhD (History), University of Zagreb, 88 Radoslav Cimerman Street, Zagreb, Republic of Croatia, postal code 10000 (besimqeriqi@gmail.com)

ORCID: 0000-0003-1554-5284
Scopus Author ID: 58866392100

Бесім КЕРІКІ

доктор філософії (історія), Загребський університет, вул. Радослава Цимермана, 88, м. Загреб, Республіка Хорватія, індекс 10000 (besimqeriqi@gmail.com)

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**THE LEAGUE OF PRIZREN: RESISTANCE AND DIPLOMACY DEFENSE
OF TERRITORIAL INTEGRITY 1878 – 1881**

Abstract. *The purpose of this research is to analyze the political strategy of the League of Prizren in response to the geopolitical shifts mandated by the Treaty of San Stefano and the Congress of Berlin. The study focuses on the League's transformation from a reactive defense movement into a proto-state organization that sought the administrative unification of the vilayets of Scutari, Kosovo, Monastir, and Janina into a single autonomous entity. The methodology of this research is based on a comparative historical method, triangulating two primary source groups: the Ottoman administrative records (decrees and minutes of the Sublime Porte) and the British Diplomatic Archives (Foreign Office consular reports and telegrams). This confrontation of sources allows for an analysis of the correlation between the diplomatic petitions sent to the Great Powers and the active military resistance maintained on the ground. The scientific novelty of this paper is to study transcends traditional historiographical narratives by analyzing memoranda as sophisticated instruments of modern diplomacy. The novelty lies in the argument that the League's success derived from the strategic synchronization of tactical military defense (notably in Plava and Guci) with high-level diplomatic lobbying. Although international power dynamics prevented the actual unification of the four vilayets, this interaction established the “political DNA” of Albanian statehood, providing the institutional and conceptual framework that preceded the events of 1912. Conclusion. The findings demonstrate that the 1878–1881 period marked the emergence of the Albanian factor as a pivotal geopolitical actor. While the Great Powers initially denied the Albanian national subjectivity and dictated a fragmented territorial settlement, the League's systematic diplomacy and armed resistance prevented total ethnic dissolution. The unification of the intellectual elite across confessional divides institutionalized a unified national front that internationalized the Albanian Question. Ultimately, while the independence achieved in 1912 resulted in a territorially truncated state representing only a fraction of the four-vilayet project the political foundations laid in 1878 remained the axiomatic basis for national survival. This process found historical continuity in the efforts for self-determination that culminated in Kosovo's statehood in 2008, proving that political unity and administrative claims were essential prerequisites for international recognition in the face of systemic territorial partition.*

Key words: Renaissance, Albanian League of Prizren, East Crisis, Treaty of San Stefano, Congress of Berlin, Albanian Resistance.

ПРИЗРЕНСЬКА ЛІГА: ОПІР ТА ДИПЛОМАТІЯ ДЛЯ ЗАХИСТУ ТЕРИТОРІАЛЬНОЇ ЦІЛІСНОСТІ 1878 – 1881 рр.

Анотація. Метою цього дослідження є аналіз політичної стратегії Призренської ліги у відповідь на геополітичні зрушення, спричинені Сан-Стефанським договором та Берлінським конгресом. Дослідження зосереджено на трансформації Ліги з реактивного оборонного руху в протодержавну організацію, яка прагнула адміністративного об'єднання вілаєтів Скутарі, Косово, Монастир та Яніна в єдине автономне утворення. **Методологія цього дослідження** базується на порівняльно-історичному методі, що триангулює дві групи первинних джерел: османські адміністративні записи (укази та протоколи Високої Порти) та британські дипломатичні архіви (консульські звіти та телеграми Міністерства закордонних справ). Таке зіставлення джерел дає змогу проаналізувати кореляцію між дипломатичними петиціями, надісланими Великим державам, й активним військовим опором, що підтримувався на місцях. Наукова новизна цієї статті полягає у дослідженні, яке виходить за рамки традиційних історіографічних наративів шляхом аналізу меморандумів як складних інструментів сучасної дипломатії. **Новизна** полягає в аргументі, що успіх Ліги зумовлений стратегічною синхронізацією тактичної військової оборони (зокрема, у Плаві та Гучі) з дипломатичним лобюванням на високому рівні. Хоча міжнародна динаміка сил перешикодила фактичному об'єднанню чотирьох вілаєтів, ця взаємодія встановила “політичну ДНК” албанської державності, забезпечивши інституційну та концептуальну основу, що передувала подіям 1912 р. **Висновки.** Результати дослідження показують, що період 1878 – 1881 рр. ознаменувався появою албанського фактору як ключового геополітичного актора. Хоча великі держави спочатку заперечували албанську національну суб'єктність та диктували фрагментоване територіальне врегулювання, систематична дипломатія і збройний опір Ліги запобігли повному етнічному розпаду. Об'єднання інтелектуальної еліти, попри конфесійні розбіжності, інституціоналізувало єдиний національний фронт, який інтернаціоналізував Албанське питання. Зрештою, хоча незалежність, досягнута в 1912 р., призвела до територіально усіченої держави, яка представляла лише частину проєкту чотирьох вілаєтів, політичні основи, закладені в 1878 р., залишилися аксіоматичною основою національного виживання. Цей процес знайшов історичну безперервність у зусиллях щодо самовизначення, які завершилися державністю Косова в 2008 р., довівши, що політична єдність і адміністративні претензії були важливими передумовами для міжнародного визнання в умовах системного територіального поділу.

Ключові слова: Відродження, Албанська Призренська ліга, Східна криза, Сан-Стефанський договір, Берлінський конгрес, Албанський Опір.

Problem Statement, Review of Recent Research and Publications. The historiographical analysis of the League of Prizren has evolved from a linear narrative of events toward a structural examination of nascent state-building. This study situates itself within a scholarly lineage that bridges the gap between internal political organization and external diplomatic recognition.

The conceptual foundation is established by Stavro Skendi (1967), who interprets the League as a sophisticated ideological project. S. Skendi argues that the movement succeeded in creating a unified political articulation that transcended regional and confessional divides, transforming the “Albanian factor” into a formal diplomatic subject at the Congress of Berlin.

From an archival perspective, Skender Rizaj (1978) introduced a critical methodological shift by integrating Ottoman bureaucratic records. S. Rizaj proves that the League was not a mere instrument of the Sublime Porte; rather, it strategically co-opted the existing administrative infrastructure of the vilayets to establish a proto-state authority that frequently challenged the Sultan’s central directives. This internal “duality of power” is further explored by Stefanaq Pollo & Selami Pulahu (1981), who identifies the institution of the Besa (the oath)

as a formal legal mechanism that endowed the League with the legitimacy of a provisional government aimed at administrative unification.

Miranda Vickers (1995) contribution introduces a crucial dimension by situating the Albanian response within the context of imperialist rivalries. M. Vickers argues that the Treaty of San Stefano was strategically designed to curb the Austro-Hungarian influence and strengthen Russia's position in the Balkans, thereby reducing the Albanian territory to a mere object of fragmentation.

Isa Blumi (2003) introduces a crucial dimension to this dynamic by dissecting the fluidities of late-Ottoman diplomacy and local resistance. I. Blumi challenges traditional monolithic views of Ottoman imperial control, demonstrating that marginalized populations in the regions like the Malësia (highlands) navigated contradictory imperial policies, where the Sublime Porte was often willing to compromise local territorial integrity under diplomatic pressure. I. Blumi's study highlights how local Albanian actors strategically leveraged these imperial vulnerabilities, transforming borderland anxieties into structured political and military resistance.

The international dimension of this resistance is validated by Noel Malcolm (2001). Utilizing British Foreign Office records, N. Malcolm demonstrates that the Albanian resistance particularly in the Vilayet of Kosovo became an insurmountable geopolitical obstacle to Slavic expansionism, forcing the Great Powers to recalibrate the regional balance of power.

The synthesis of these developments is provided by Kristo Frashëri (2012), who contends that the League's primary achievement was the symbiosis of armed defense and "the diplomacy of the pen". However, as historical data confirms, this maximalist project for the unification of the four vilayets was eventually suppressed by the Great Powers. Consequently, the state declared in 1912 was not the fulfillment of the 1878 vision but a territorially truncated and halved entity forced to operate within strictly limited borders.

The present study builds upon this literature by focusing specifically on diplomatic telegrams as primary instruments of communication. It examines how the political language utilized by the Albanian actors was either adopted or marginalized by the British and Ottoman chancelleries, filling a specific gap in the study of diplomatic linguistics and power dynamics.

The purpose of this research is to analyze the political strategy of the League of Prizren in response to the geopolitical shifts mandated by the Treaty of San Stefano and the Congress of Berlin. The study focuses on the League's transformation from a reactive defense movement into a proto-state organization that sought the administrative unification of the vilayets of Scutari, Kosovo, Monastir, and Janina into a single autonomous entity.

Research Results.

National Albanian Awakening

The Albanian territories were among the first in the Balkans to fall under Ottoman suzerainty, beginning in 1385 (Skendi, 1967, p. 17). This occupation fundamentally altered the region's political, economic, and social landscape, marking the historical genesis of the "Albanian Cause". Throughout centuries of imperial rule, consistent resistance culminated in the National Awakening (Rilindja Kombëtare). Emerging in the late 18th and early

19th centuries, this era coincided with a global wave of European revolutions against feudal structures. This burgeoning national consciousness profoundly reshaped the Albanian territories (Rahimi, 1986, p. 34).

The resulting National Movement (1830 – 1912) was propelled by two primary catalysts: the martial legacy of the national hero, Gjergj Kastrioti Skanderbeg, and the secular ideals of the European Enlightenment. The movement operated across two strategic axes: a cultural dimension focused on fostering identity through education, and a political dimension aimed at organizing liberation through assemblies and regional covenants, eventually leading to the Declaration of Independence on November 28, 1912 (Prifti et al., 2002, pp. 17–26). Socio-Economic Obstacles and the Eastern Crisis Despite the systemic poverty and underdevelopment fostered by Ottoman rule, the Albanian efforts toward liberation remained resilient against assimilation. By the late 19th century, while the Greeks had secured independence (1829), the majority of Balkan population remained subjugated. The Balkans transformed into a theatre for the competing interests of Great Powers, instilling a justified fear of territorial partition among the local populations. The Albanians, Bosnians, and Macedonians faced a particularly arduous journey toward sovereignty due to three primary factors: The absence of a robust bourgeoisie resulting from underdeveloped socio-economic conditions; the systematic denial of educational rights by the Ottoman authorities; the entanglement of their territories in the diplomatic “war of maps” between Great Powers seeking to redistribute Ottoman possessions (Frashëri, 2012, p. 124). The fragility of the Albanian position was further exacerbated by the specificities of late-Ottoman diplomacy. As a historian Isa Blumi (2003) notes, the Ottoman officials frequently disowned large tracts of the Malësia (highlands) on the grounds that the population was “Christian”. This represented a remarkable demonstration of Hamidian diplomacy a policy identified by some scholars as an attempt to consolidate the Islamic character of the empire. While one may not fully subscribe to this reading of Hamidian policy, it remains historically significant that officials were willing to cede “Christian” territories that had been part of the Ottoman realm for 500 years and, crucially, had never been militarily captured by the Serbian, Russian, or Montenegrin forces. As a result of these narrowly defined and often sectarian diplomatic positions, the region faced a series of outside interventions that fundamentally destabilized inter-community relations and complicated the Albanian struggle for a unified, sovereign state (Blumi, 2003, pp. 40–41).

Ideological Secularism and the Oath of Unity. The primary objective of the Albanian leadership was to organize a national revolution capable of repelling both Ottoman rulers and the expansionist ambitions of neighbouring states. To achieve this, the movement adopted a secular ideological framework that prioritized ethnic solidarity over sectarian identity. This was famously encapsulated by Pashko Vasa: “Awaken Albania, wake from your slumber... The religion of Albanians is Albanianism” (Vasa, 2010, p. 96).

This shift provided the necessary social cohesion to unite the diverse Albanian regions, transcending religious divisions to establish a unified front that would eventually challenge the decisions of the Porte and the Great Powers at the League of Prizren. Geopolitical Manipulation: The Reichstadt Agreement. The strategic interests of the Great Powers were most overtly demonstrated by the Reichstadt Agreement (July 8, 1876). In this secret

accord, Russia and Austria-Hungary determined the future of “European Turkey” without consulting the Balkan peoples. Bolstered by the Russian moral and material support, the Slavic committees in Bosnia, Herzegovina, Serbia, and Bulgaria launched uprisings against the weakening Ottoman centre (Rizaj, 1998, p. 44). The rugged terrain and the vast distance from Constantinople favoured these rebellions. As the Ottoman Empire’s decline accelerated, it became clear that the localized resistance movements would soon coalesce into a broader struggle for national survival in the face of imperial collapse.

Albanians in the face of Annexation Plans of Neighbouring Countries

In an ideal geopolitical environment, regional cooperation would have been the logical prerequisite for liberation. The Balkan peoples remaining under Ottoman suzerainty the Albanians, Serbs, Montenegrins, Bosnians, and Bulgarians shared a centuries-old history of imperial submission. As the demise of the Ottoman Empire became inevitable, a unified resistance offered the most viable path to expelling the Sublime Porte. However, the expansionist agendas of Greece, Montenegro, and Serbia regarding the Albanian territories rendered stable diplomatic relations nearly impossible. This predicament was aptly characterized by the Serbian social-democrat Dimitrije Tucović, who described the Albanian people as being caught “between the anvil and the hammer” combating Ottoman oppression on one side while facing the emerging threat of neighbouring Balkan states aiming to become new oppressors (Tucović, 2010, p. 46).

This dynamic intensified as the Ottoman downfall accelerated. The weaker the Porte grew, the more aggressive the neighbouring states became toward the Albanian cause. This chauvinistic drive for territorial expansion was formalized as early as 1844. Notably, the “Megali Idea” (The Great Idea), formulated by the Greek Prime Minister Ioannis Koletis, envisioned expanding the Greek kingdom into a neo-Byzantine state with Istanbul as its capital. Initially, this program encompassed all of Albania; however, by the 1860s, the proposed northern border shifted between the Drin, Shkumbin, and Vjosa rivers, representing a profound threat to the Albanian territorial integrity (Prifti et al., 2002, p. 103; Frashëri, 2012, pp. 120–121).

The blatant nature of these policies astounded the traveller and scholar Edith Durham, who noted the bitter irony that the Albanians had significantly contributed to the cause of Greek Independence. Rather than recognizing this historic assistance, Greece sought to expand at the direct expense of those very allies (Durham, 2001, p. 55). Simultaneously, from the north, Albania faced the Serbian political project known as Načertanije (The Draft). Authored by Ilija Garašanin, this document aimed to consolidate surrounding territories into a Greater Serbian state, restoring the medieval empire of Tsar Dušan. According to the Načertanije, the borders of this envisioned state would encompass Northern Albania and Kosovo territories Garašanin strategically labelled “Old Serbia” (Prifti et al., 2002, p. 103; Ćirković, 2004, p. 212).

These Pan-Slavic ambitions aroused profound existential fear among the Albanians, especially as Montenegro and Serbia bolstered by the Russian patronage emerged victorious against the Ottomans. For the Albanians, the hope for national independence was swiftly overshadowed by a crisis of survival. The plans for fragmentation were no longer mere border disputes; they represented a systemic threat to the nation’s existence (Pollo, 1981, p. 46). The

Serbian and Montenegrin strategies aimed to exploit the turmoil in Bosnia to expand their dominion, coordinating an annexation policy under the aegis of Russia (Bartl, 2017, pp. 101–102). This solidified the Albanian conviction that the Russian victory in the Russo-Turkish War would result in total territorial disintegration and political downfall (Frashëri, 2012, p. 144).

Ottoman military defeat in 1877 – 1878 to the Russians intensified growing fears among European powers that the Tanzimat reforms instigated since the 1840s were not succeeding in strengthening the empire, a key requisite to maintaining the balance of power in the Balkans. To many, the weakening of the Ottomans' hold on their Balkan subjects allowed Russian intrigue to threaten European peace and development (Blumi, 2003, p. 239). In this context, the Albanian struggle became a complex survival effort against a fading empire, predatory neighbours, and a disinterested European diplomatic corps.

The Albanian Cause against the Decisions of the Great Powers

The geopolitical status of the Albanians reached a critical juncture with the signing of the Treaty of San Stefano on March 3, 1878. While rumors had circulated for weeks, the full gravity of the accord was only confirmed in April, when the official text corroborated those Albanian lands were being treated as mere objects of fragmentation (Frashëri, 2012, p. 171).

From a broader diplomatic perspective, this fragmentation was a direct result of Great Power rivalries. According to historian Miranda Vickers, the treaty was strategically designed to curb Austro-Hungarian influence in the Balkans, satisfy Pan-Slavists who wished to see the liberation of all Slavs, and fundamentally strengthen Russia's position in the region (Vickers, 1995, p. 47). Consequently, because its territory sat at the intersection of these imperial ambitions, Albania emerged as one of the primary victims of the treaty.

The practical implications of this diplomatic alignment manifested in a sweeping mandate to partition nearly half of all Albanian-inhabited territories among neighboring Slavic states. Under the terms of the accord, the newly projected "Greater Bulgaria" was slated to annex the prominent south-western and eastern provinces of Korça, Bilisht, Pogradec, Struga, Dibra, Kërçova, Gostivar, Tetovo, Skopje, and Kaçanik. Simultaneously, Serbia aimed to extend its borders southward to annex northern and north-eastern Kosovo up to Mitrovica. To the northwest, Montenegro was projected to triple in size by absorbing a vast bloc of Albanian lands, including Ulcinj, Kraja, Anamal, Hoti, Gruda, Tuz, Kelmendi, Plava, Gucia, and Rugova. Faced with this imminent threat of territorial dissolution, the Albanian leadership was forced to rapidly transition from passive alarm to structured political resistance. In immediate response to these existential threats, the Albanian intellectuals spanning Muslim, Orthodox, and Catholic backgrounds transcended regional and religious divides, coalescing in Istanbul to establish the "Central Committee for the Protection of the Rights of the Albanian Nation". Serving as a unified voice for all Albanian-inhabited regions, this body formulated a cohesive national strategy to navigate the unfolding crisis. To operationalize this strategy, the Committee launched a dual-pronged approach: an extensive diplomatic campaign addressing Western powers to contest the treaty's legitimacy, running parallel with the systematic mobilization of domestic patriotic sentiment to resist the looming partition on the ground (Rahimi, 1986, p. 100; Malcolm, 2001, p. 229).

This protest found a powerful manifestation on May 26, 1878, when the leaders of Prizren wrote to the French Ambassador, declaring: “We are protesting in the name of human freedom... We have taken an oath that we will sacrifice even our lives if necessary” (Pollo & Pulaha, 1978, p. 15). Similar defiance emerged in Dibra, where citizens vehemently contested their inclusion in Bulgaria, asserting their inextricable identity as the Albanians (Skendi, 1967, p. 43). The resistance assumed a multifaceted character, notably characterized by centuries of interfaith solidarity. In a formal protest note from Shkodra and its surrounding highlands, Catholic and Muslim leaders stated: “We, Catholics and Muslims, brothers for centuries... have always been united to resist acts of robbery”. The signatories expressed a profound sense of betrayal by the Ottoman Porte, which, under the Russian duress, had consented to surrender their lands to “enemies of four centuries” (Pollo, & Pulaha, 1978, p. 12).

The indignation of the Albanian people was directed not only toward Russia and its Balkan allies but also toward the Porte for signing an act that effectively “sentenced their homeland to death” (Prifti et al., 2002, p. 29). However, geopolitical friction soon intervened as Austria-Hungary and Great Britain, seeking to curb Russian influence, demanded a revision of the treaty. This led to the Congress of Berlin (June 13 – July 13, 1878), chaired by Otto von Bismarck. Despite the revision, the Congress systematically ignored the Albanian cause, treating their provinces as pawns to suit the strategic interests of the Great Powers (Buda, 2006, pp. 344–345). The Albanians argued for parity, asking why the Serbs, Montenegrins, and Bulgarians were granted statehood based on national elements while the Albanians were denied the same (Nushi, 2011, p. 24).

This marginalization resulted in profound despair for the Albanian people. As Europeans, they had contributed to the protection of western civilization for years. Furthermore, the figure of Gjergj Kastrioti – Skanderbeg had a deep political meaning for Europe since, under his leadership, the Albanians had been Europe’s shield against the Ottoman penetration in Europe in the 15th century. Four centuries later, the homeland was subject to fragmentation from the Congress of Berlin (Kondo, 1988, p. 110). In other words, the Congress of Berlin, similar to the Treaty of San Stefano, had the same opinion about the Albanian cause and territories, considering them as Ottoman possessions.

The Albanian League of Prizren

The initiative to organize a general assembly of Albanian leaders was rooted in a profound historical tradition of tribal assemblies (*kuvende*), which served as the fundamental mechanism for communal decision-making and resistance (Malcolm, 2001, p. 229). Unlike neighbouring Balkan movements that leveraged medieval legacies to justify expansionist agendas most notably the Serbian “Greater Serbia” projects the Albanian tradition of union was defensive and devoid of territorial ambitions. Instead, the National Movement drew its primary inspiration from the era of Gjergj Kastrioti Skanderbeg (Prifti et al., 2002, p. 29). Recognizing that the Sultan’s forces could not be repelled individually, G. Skanderbeg convened the League of Lezha on March 2, 1444, committing the diverse Albanian tribes to a unified front (Noli, 2018, pp. 67–69). The existential necessity of confronting a superior imperial power taught Albanian insurgents to transcend localism and forge inter-provincial ties based on a shared ethnic identity (Pollo, 1981, p. 46).

In accordance with Albanian custom, political unity and military mobilization served as the prerequisite to armed conflict. By December 1877, “provincial liaisons” and “self-defense commissions” were established across various regions to suspend local disputes in favour of national survival (Frashëri, 2012, p. 180). Consequently, the establishment of a national League was viewed as the logical continuation of this ancestral resistance. The League of Prizren emerged as a matter of urgent necessity in the spring of 1878, designed to forge a union rooted in this ancient custom: provinces would first convene local assemblies before dispatching representatives to a general national assembly to coordinate a unified response (Prifti et al., 2002, p. 153).

The League of Prizren functioned as a defiant response to the detrimental decisions imposed by the Great Powers at San Stefano and the anticipated resolutions of the Congress of Berlin. Orchestrated by the Istanbul Committee, the General Assembly convened on June 10, 1878 strategically timed just three days before the Congress of Berlin began to ensure the Albanian demands reached the international stage. The selection of Prizren as the host city was deliberate. As noted by a historian Kristo Frashëri (2012, p. 205), the Assembly’s primary mandate was to organize an armed defense against Bulgarian, Serbian, and Montenegrin occupation. Consequently, the movement required a headquarters in close proximity to these volatile fronts; only a major centre in Kosovo could serve such a critical strategic purpose.

During its proceedings, the Assembly established a Central Committee tasked with coordinating a broad national front dedicated to opposing the fragmentation of the Albanian territories (Skendi, 1967, p. 45; Prifti et al., 2002, pp. 153–155). As the decline of the Ottoman Porte became increasingly inevitable, two distinct ideological currents emerged regarding the methodology of liberation. The more progressive faction, led by Abdyl and Sami Frashëri, advocated for complete secession and a general armed uprising, identifying total independence as the only sustainable future for the nation. In contrast, a conservative and feudal faction with pro-Islamic tendencies expressed significant hesitation. These figures, who benefited from the existing Ottoman socio-political hierarchy, sought to preserve their class privileges and feared the radical disruptions inherent in total independence. To maintain national cohesion and avert a disastrous internal schism during this existential crisis, Abdyl Frashëri’s group exercised “strategic tolerance”. They sought a compromise with the conservatives to ensure a unified resistance against immediate external threats (Pollo, 1981, p. 50; Rahimi, 1986, pp. 84–112).

After several days of intense deliberation, the Assembly finalized its program on June 18, 1878. The movement was governed by the *Kararname* a regulation of military and administrative character that defined the structural parameters of the national resistance. While historiography has yet to confirm the exact number of participants, records identify 110 prominent figures from diverse social strata. Key participants included Ali Bey Guçia, Hasan Pasha Tetova, Ymer Prizreni (Chairman of the Committee), Sylejman Vokshi, and the Assembly Chairman, Iljaz Pasha Dibra. Abdyl Frashëri, managing diplomatic affairs, delivered a seminal address: “The aim of the Assembly is to halt our ruthless enemies by taking an Albanian oath and swearing to protect with our lives our lands inherited from our grandfathers and great-grandfathers” (Prifti et al., 2002, pp. 154–155).

The League effectively assumed the functions of a provisional government. Under Article I of the Talim (the administrative ordinance within the “Act of Decisions”), Prizren was designated as the administrative headquarters. The Assembly functioned as the supreme legislative body, while the Central Council served as the executive authority. This Council was charged with establishing an expansive network of local administrative bodies across all Albanian-inhabited territories, integrating representatives from every sanjak and kaza to ensure unified governance (Pollo, & Pulaha, 1978, p. 43; Rexha, 1978, p. 26). To ensure democratic legitimacy, copies of the League’s program were distributed to major Albanian urban centres for public review, collecting signatures to be presented as a collective national demand (Arsh et al., 1967, p. 107).

As the decisions of the Great Powers regarding the fragmentation of Albania were ratified, the delegates departed from Prizren with a solemn conviction: diplomacy had reached its limits, and armed struggle was the final alternative. Pollo (1981, p. 48) summarizes that the League’s activity was driven by three uncompromising strategic objectives: The recognition of the Albanian nation as a single and indivisible entity. The preservation of the integrity of Albanian national lands. The unification of all Albanian-inhabited territories into a single, autonomous administrative unit.

Throughout the month-long Berlin Congress, a flood of protests and petitions had poured in from the Albanians. The Albanians’ principal desire was for the unification of the southern vilayets with those of Shkoder, Uskub and Kosova, and to make Ohrid the capital owing to its central position. One of the first acts of the Albanian League was to send a memorandum to Lord Beaconsfield, Britain’s delegate to the Berlin Congress. It read: “Just as we are not and do not want to be Turks, so we shall oppose with all our might anyone who would like to turn us into Slavs or Austrians or Greeks, we want to be Albanians” (Vickers, 1995, p. 51.)

The Albanian Resistance

The resolutions of the Congress of Berlin served as a definitive signal to the League’s leadership that the era of petitions and telegrams had failed to yield tangible results. Faced with the imminent fragmentation of their homeland, the Albanians embraced the conviction that their lands could only be preserved through force; as noted at the time, “a man’s best friend” had become his rifle (Skendi, 1967, p. 61). The League Committee committed to opposing, at any cost, the cession of Chameria to Greece and the surrender of Plava and Gucia to Montenegro. While the defense of Chameria allowed for a brief diplomatic window while the southern Turco-Greek border was finalized, the northern front at Plava and Gucia required immediate military mobilization (Frashëri, 2012, pp. 278–279).

The League’s resolve for armed resistance increasingly alarmed the Ottoman government. As a historian Aleks Buda notes, this concern underscored the authentic national character of the League; it was an organization established to safeguard Albanian interests, not Ottoman ones (Buda, 2006, p. 348). This distinction was validated by the British Consul in Shkodra, Kirby Green, who reported in November 1878 that League leaders declared: “The Sultan cannot sell an inch of [Albania’s] land without asking its heirs, the Albanians” (Rizaj, 1978, p. 152).

Following the signing of the Treaty of Berlin, the Great Powers exerted mounting pressure on the Sublime Porte to implement the newly established mandates. Under the threat of

Russian armies stationed near Istanbul, the Porte was compelled to expedite the transfer of northern Albanian territories to Montenegro (Prifti et al., 2002, p. 168).

To facilitate this transfer, an Ottoman–Montenegrin Delimitation Commission set out to tour the region in early August 1878. Tension reached a climax during this period with the arrival of Mehmet Ali Pasha (Karl Detroit), a general tasked by the Sultan with demarcating the new borders. According to a historian Isa Blumi, the general attempted to find a middle ground to avoid conflict; he proposed a compromise that would hand over parts of Herzegovina (populated by Orthodox Slavs) to Montenegro in exchange for keeping Plava and Gusinje within the Ottoman Empire. Ultimately, however, the Great Powers did not approve of Mehmet Ali Pasha's reasoning. Austria's interests in Bosnia did not permit the expansion of Montenegro at their expense, and none of the European states fully understood why the local opposition predicted by the general would pose a significant obstacle. Consequently, the treaty was left to stand as initially planned (Blumi, 2003, p. 241).

Faced with this diplomatic deadlock, during a meeting in Prizren, Mehmet Ali Pasha warned Balkan Muslims of "dire consequences" should they continue to resist. However, as he travelled to Gjakova, he was met with overwhelming hostility (Buda, 2006, p. 348; Frashëri, 2012, p. 307). The local response was immediate and, as the general had feared, eventually turned violent.

On September 6, 1878, an estimated 15,000 to 20,000 Albanians led by Ali Pasha Gučia besieged the residence of Abdullah Pasha Dreni, where the general was being hosted. The ensuing conflict resulted in the death of both Mehmet Ali Pasha and his host, marking a definitive violent rejection of the Berlin mandates by the League of Prizren (Skendi, 1967, p. 63).

This event had three profound impacts: Political Rupture, it ended all pretense of cooperation between the League and the Ottoman government Military Resolve, it solidified the determination of local populations to resist partition by force. International Visibility, it thrust the "Albanian Cause" into Western headlines, forcing European diplomats to acknowledge the movement's strength (Malcolm, 2001, p. 231). In tandem with military action, the League launched a sophisticated diplomatic mission to Rome, Paris, Vienna, and Berlin. Representatives Abdyl Frashëri and Mehmet Vrioni sought to convince the Great Powers to abandon border ratifications in Epirus. Ottoman diplomatic telegrams from early 1879 confirm the gravity of this mission, noting that the delegates were prepared to declare that all Albanians would "fight united as a single body" against Greek annexations, even if the Porte itself felt forced to concede (Prifti, 1978, pp. 30–31). The military and diplomatic combination of the League began to alter European perspectives. The French Ambassador in Istanbul, Furnié, eventually conceded that the only practical solution to avoid a massive Albanian uprising was to abandon Greek territorial requests in Epirus (Frashëri, 2012, p. 349).

Istanbul was caught in a strategic vice: the Treaty of Berlin entitled the Sultan to intervene, but doing so required a direct and costly confrontation with the League (Frashëri, 2012, p. 321). After a failed negotiation mission by Mukhtar Pasha in December 1879, the Porte was forced to admit to the Great Powers its inability to fulfill its obligations to Montenegro an excuse the government in Cetinje rejected. Montenegro, backed by its rights under the Berlin Congress,

continued to demand the direct cession of Podgorica, Shpuza, Žabljak, Plava, Gucia, and Rugova (Prifti et al., 2002, p. 178; Rizaj, 1998, p. 166).

Geopolitical tensions reached a breaking point as Montenegro issued an ultimatum, citing the unsustainable cost of maintaining 25,000 soldiers at the ready (Frashëri, 2012, p. 395). In late 1879, the Montenegrin army under Marko Miljanov launched a massive assault on Plava and Gucia. They were met by the League's forces led by a coalition of commanders: Ali Pasha Gucia, Jakup Ferri, Sylejman Vokshi, Haxhi Zeka, Filip Çeka, and Jusuf Sokoli. In fierce combat, the League's volunteers inflicted a decisive defeat on the Montenegrin troops, forcing a retreat that caused profound despair in Cetinje (Prifti et al., 2002, p. 180; Rizaj, 1998, pp. 166–167). Stunned by the Albanian resilience in the mountains, Britain and Austria-Hungary proposed a coastal compromise: compensating Montenegro with the strip from Ulcinj to the Buna River. The logic was that the Great Powers' navies could intervene more effectively by sea. The League, however, rejected this "reward". Volunteers from Shkodra occupied Ulcinj, while the Assembly of Dibra (October 20, 1880) convened to address three pillars: the defense of Ulcinj, the creation of an autonomous vilayet, and the formation of a provisional government (Prifti et al., 2002, p. 202).

Under the pressure of a combined Great Power naval demonstration, the Sublime Porte eventually capitulated. To salvage its reputation and demonstrate "goodwill" to Europe, the Ottoman government issued categorical instructions to facilitate the peaceful transfer of Ulcinj to Montenegro, effectively positioning the imperial centre against the Albanian volunteers entrenched on the coast (Rexha, 1978, p. 88; Rizaj, 1978, p. 173).

The Ottoman Porte took its most decisive step against the movement by deploying Dervish Pasha and eighteen battalions. On November 3, 1880, arriving in Shkodra, he marginalized local leaders and marched toward Ulcinj to enforce the territorial cession (Külçe, 2004, p. 141). Upon arrival, Dervish Pasha issued a stern ultimatum: the transfer of Ulcinj to Montenegro was an "irrevocable state obligation" mandated by the Great Powers. He warned that any resistance would be met with the full force of his authorizations (Rizaj, 1978, p. 174). Despite this, the Albanians remained resolute. In a poignant protest note dated November 16, 1880, the League Committee condemned the Pasha's blockade of the Shkodra-Ulcinj road, declaring that if the imperial army attacked to facilitate the Montenegrin takeover, they would "definitively rebel" and "punish him with war" (Pollo & Pulaha, 1978, p. 118). Their commitment was absolute and secular: "All of us, regardless of religion, have decided to object by force the invasion of our lands by any force, be it Muslim or other" (Skendi, 1967, p. 70).

The ensuing conflict was a desperate, unequal struggle. Facing 10,000 regular Ottoman troops and immense diplomatic pressure from the British Consul Green and Austro-Hungarian Consul Lippich, the League's ranks began to fracture under the weight of the "Ulcinj blockade". While some members succumbed to the pressure, the defenders of Shkodra and the local volunteers fought a heroic three-day campaign. Following fierce engagements at the Battle of Klesna and Saint George, Ottoman forces finally occupied Ulcinj on the evening of November 24, 1880 (Frashëri, 2012, pp. 603–609). The fall of the city closed the chapter on the northern border disputes but left a lasting echo in Europe, where public opinion began to shift against the discriminatory policies of the Great Powers regarding Albanian

national rights. While the northern crisis subsided, the southern border remained a significant challenge. In June 1880, the Great Powers proposed the Kalamas River as the boundary, which would have granted Ioannina to Greece. Ultimately, to satisfy Greek claims, the Powers ceded Thessaly territory the League had also claimed further alienating the Albanian leadership (Frashëri, 2012, p. 662).

Seeing the diplomatic path settled, the Porte turned its full military might toward the total suppression of the League. Dervish Pasha, having advised the Sultan to bypass concessions in favour of brute force, launched a massive expedition with 30 battalions, approximately 20,000 soldiers. In Prizren, Abdyl Frashëri issued a final, visionary call for unity: “The Porte will not do anything for Albania... Let us think and work for ourselves. Let’s leave the divisions between the Tosks and the Ghegs aside. Let us be Albanian and let us create Albania” (Malcolm, 2001, p. 235). Dervish Pasha’s campaign began with the seizure of Skopje and the arrest of Jashar Bey Shkupi. Declaring a state of siege, Ottoman forces systematically dismantled the League’s infrastructure, arresting Committee members and exiling them to the island of Rhodes (Prifti et al., 2002, p. 221). With its leadership imprisoned and its territory occupied by the very empire it had once hoped to reform, the League’s formal existence came to an end, though its ideological legacy remained the foundation for the eventual independence of 1912.

Dervish Pasha’s strategy was twofold: to intimidate the leadership through the detention of key figures in Skopje and to demoralize rank-and-file partisans before a single shot was fired (Frashëri, 2012, pp. 671–674). On April 16, 1881, the Ottoman army, boasting 15,000 soldiers and 12 mountain cannons, occupied Ferizaj and declared a state of siege. In response, the League mobilized approximately 7,000 fighters in a desperate attempt to encircle the Ottoman camp near Kaçanik and Lipjan (Rizaj, 1998, p. 220). Despite Dervish Pasha’s chilling ultimatum, the League launched its operation with a mere 5,000 volunteers. Led by figures such as Mic Sokoli, Sef Koshare, Mulla Hyseni, Binak Ali, and Sylejman Vokshi, these fighters were vastly outmatched by Ottoman heavy artillery and professional training (Frashëri, 2012, pp. 678–683). The decisive clash occurred on April 20, 1881, at the Battle of Slivovo. For several hours, the Albanians held their ground until Ottoman field artillery began its devastating bombardment. In an act of extraordinary heroism, Commander Mic Sokoli famously threw his chest against an Ottoman cannon to silence it, sacrificing his life in the process. With military resistance extinguished, Dervish Pasha focused on erasing the League’s ideological core. He identified Abdyl Frashëri as the primary architect of the movement and placed a bounty on his head. Frashëri was eventually captured near Elbasan in late April 1881. Dervish Pasha’s telegrams to the Porte identified Frashëri as the “main cause” of the uprising, citing documents that proved his intent to unify the vilayets through force (Rexha, 1978, p. 123).

Though the Porte succeeded in military suppression, it failed to extinguish the spirit of the movement. The League of Prizren irrevocably widened the gap between the Albanian people and the Ottoman Empire, serving as the “Great Turning Point” for national emancipation. The aspirations forged between 1878 and 1881 provided the direct inspiration for the League of Peja (1899), the Congress of Manastir (1908), and the general uprisings that culminated in

the Declaration of Independence on November 28, 1912 (Prifti et al., 2002, p. 226; Malcolm, 2001, pp. 235–236).

Conclusion. The findings demonstrate that the 1878 – 1881 period marked the emergence of the Albanian factor as a pivotal geopolitical actor. While the Great Powers initially denied the Albanian national subjectivity and dictated a fragmented territorial settlement, the League's systematic diplomacy and armed resistance prevented total ethnic dissolution. The unification of the intellectual elite across confessional divides institutionalized a unified national front that internationalized the Albanian Question. Ultimately, while the independence achieved in 1912 resulted in a territorially truncated state representing only a fraction of the four-vilayet project the political foundations laid in 1878 remained the axiomatic basis for national survival. This process found historical continuity in the efforts for self-determination that culminated in Kosovo's statehood in 2008, proving that political unity and administrative claims were essential prerequisites for international recognition in the face of systemic territorial partition.

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Ihor SOLIAR

PhD hab. (History), Professor, Director of the I. Krypiakevych Institute of Ukrainian Studies, National Academy of Sciences of Ukraine, 4 Kozelnytska Street, Lviv, Ukraine, postal code 79026 (isoliar@ukr.net)

ORCID: 0000-0003-0439-6957

Serhii VITVITSKYI

PhD hab. (Law), Professor, Rector of Donetsk State University of Internal Affairs, 1 Velyka Perspektyvna Street, Kropyvnytskyi, Kirovohrad region, Ukraine, postal code 25000 (rector@dnuvs.ukr.education)

ORCID: 0000-0002-4884-1883

Igor СОЛЯР

доктор історичних наук, професор, член-кореспондент НАН України, директор Інституту українознавства імені Івана Крип'якевича НАН України, вул. Козельницька, 4, м. Львів, Україна, індекс 79026 (isoliar@ukr.net)

Сергій ВІТВИЦЬКИЙ

доктор юридичних наук, професор, ректор Донецького державного університету внутрішніх справ, вул. Велика Перспективна, 1, м. Кропивницький, Україна, індекс 25000 (rector@dnuvs.ukr.education)

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SOCIAL GUIDELINES OF THE UKRAINIAN PARTIES IN WESTERN UKRAINE (1923 – 1939)

Abstract. *The article focuses on the analysis of the parties' program priorities that concerned the main social groups of the then Ukrainian society of Western Ukraine in the context of the socio-political situation in the region. The purpose of the study is to elucidate and analyze the programmatic goals and principles of the socio-economic guidelines of the Ukrainian legal parties, as well as to outline their main practical results: defending the rights of the Ukrainian peasants, mainly in the context of the agrarian reform, which was also associated with the policy of the Polish settlement and parcelization; promotion of the cooperative movement, the use of socialist programs in terms of social protection, normalization of labour relations between peasants and workers. The research methodology is based on general scientific (systematic and comprehensive coverage of the issue) and special scientific methods. In the research there have been used the methods of synthesis and analysis, systematization and generalization. Historical, comparative and system-structural methods have been also used. Comparative analysis methods have been used to compare and contrast party programs. A problem-chronological approach has been used to outline key changes in the political life*

of Western Ukraine. More specifically, studying the problems of peasantry and workers, synthesis and analysis methods, in particular socio-structural, have been used. **The scientific novelty** of the research consists in outlining the links between the social structure of Ukrainian society during the interwar period and the actual programs of various ideological orientations parties, which were mainly focused on the Ukrainian peasantry and the resolution of national issues. The issue of social orientations of political parties in their program documents and in the context of changes in the Polish policy towards the Ukrainians has been also outlined. **Conclusions.** The social orientations of the Ukrainian legal parties of the interwar period in Western Ukraine were mainly determined by the predominance of peasantry in the social structure, which were combined with broader political problems of the Ukrainian community, which required a comprehensive solution due to the discriminatory policy of the Polish government, especially after the change of political regime in 1926 and the establishment of the “sanation” regime. The Ukrainian parties of the left and ideological orientation, in particular the Ukrainian Social Democratic Party and “Selrob”, were mainly inclined to promote the socialist order of society, but in which not only the working class, but mainly peasants, played an important role. The forces of the centrist and national democratic orientation, in particular the Ukrainian National Democratic Union, which played a leading role in the Ukrainian movement, were defined by their social orientations as the protection of peasantry and its comprehensive support, mainly of economic initiatives, along with the support of intelligentsia and entrepreneurs, which was combined with the struggle for broader rights of the Ukrainian community.

Key words: social orientations, peasantry, workers, cooperation, agrarian reform, Ukrainian National Democratic Union, Ukrainian Radical Party, Ukrainian Social Democratic Party, Ukrainian Socialist Radical Party, “Selsoyuz”, “Selrob”.

СОЦІАЛЬНІ ОРІЄНТИРИ УКРАЇНСЬКИХ ПАРТІЙ ЗАХІДНОЇ УКРАЇНИ (1923 – 1939)

Анотація У статті проведений аналіз програмних пріоритетів партій, які стосувались головних соціальних груп тогочасного українського суспільства Західної України у контексті суспільно-політичної ситуації в краї. **Мета роботи** – окреслити і проаналізувати програмні цілі та засади соціально-економічних орієнтирів українських легальних партій, а також простежити їхні головні практичні наслідки. Зокрема, це відстоювання прав українських селян, головню у контексті проведення аграрної реформи, яка була пов'язана також із політикою польського осадництва і парцеляції; промоція кооперативного руху, використання соціалістичних програм у розрізі соціального захисту, унормування трудових відносин селян та робітників. **Методологія** базується загальнонаукових (системності та всебічності висвітлення проблеми) і спеціальних наукових методах. У роботі використано методи синтезу й аналізу, систематизації та узагальнення. Також застосовувалися історичний, порівняльний та системно-структурні методи. Методики порівняльного аналізу були використанні для зіставлення, порівняння програм партій. Для окреслення ключових змін у політичному житті Західної України послуговувалися проблемно-хронологічним підходом, а для більш конкретного вивчення проблем селянства, робітництва залучали методи синтезу та аналізу, зокрема, соціально-структурного. **Наукова новизна роботи** полягає в окресленні взаємозв'язків між соціальною структурою українського суспільства міжвоєнного періоду та фактичних програм партій різного ідеологічного спрямування, які головню орієнтувалися на українське селянство, розв'язання національних питань. Також окреслено проблематику соціальних орієнтирів політичних партій у їхніх програмних документах та в умовах змін польської політики щодо українців. **Висновки:** соціальні орієнтири українських легальних партій міжвоєнного періоду у Західній Україні головню визначалися через переважаєння селянства у соціальній структурі, які поєднувалися із ширшими політичними проблемами української громади, що потребували комплексного подолання через дискримінаційну політику польського уряду, особливо після зміни політичного режиму у 1926 р. та із встановленням режиму «санації». Українські партії лівого та ідеологічного спрямування, зокрема, Українська соціал-демократична партія та Сельроб, схилились головню до промоції соціалістичного укладу суспільства, але у якому важливу роль відігравали не лише робітництво, а найперше селяни. Сили центристського та національно-

демократичного спрямування, зокрема, Українське національно-демократичне об'єднання, яке відіграло провідну роль в українському русі, своїми соціальними орієнтирами визначало захист селянства та його всебічну підтримку, насамперед господарських ініціатив, разом із підтримкою інтелігенції та підприємців, яка поєднувалася із боротьбою за ширші права української громади.

Ключові слова: соціальні орієнтири, селянство, робітники, кооперація, аграрна рформа, Українське національно-демократичне об'єднання, Українська радикальні партія, Українська соціал-демократична партія, Українська соціалістично-радикальнр партія, “Сельсоюз”, “Сельроб”.

Problem Statement. During the interwar period, the Western Ukrainian lands, which were part of the Second Polish-Lithuanian Commonwealth, became one of the main centres of the Ukrainian political life development. The peculiarities of the social structure of Ukrainian society, in which peasantry dominated, as well as the discriminatory policy of the Polish authorities influenced the programmatic principles formation of the Ukrainian political parties significantly. The Socio-economic issues, primarily the agrarian problem, protection of the rights of peasants and workers, development of the cooperative movement and social legislation, became important components of the Ukrainian political forces activities of various ideological orientations. At the same time, the parties' social orientations were combined with the struggle for the national rights of the Ukrainians and opposition to the assimilation policy of the Polish state. Despite the existence of separate studies on the activities of the Ukrainian parties of the interwar period, the problem of their social orientations and practical approaches to solving socio-economic issues remains insufficiently comprehensively covered in the Ukrainian historiography.

Review of Recent Research and Publications. The issue historiography includes the studies on the Ukrainian political movement, socio-economic processes, and the activities of political parties in Western Ukraine in the interwar period. A significant contribution to the study of Ukrainian political forces was made by Oleksandr Zaitsev and Mykola Kuhutiak. Thus, O. Zaitsev analyzed the participation of the Ukrainians in the parliamentary life of Poland, election campaigns and the peculiarities of functioning of the Ukrainian parties in the Sejm and Senate of the Second Polish Republic (Zaitsev, 1999; Zaitsev, 2022). M. Kuhutiak thoroughly researched the Ukrainian national democracy formation and the activities of the UNDO as the leading political force in Western Ukraine (Kuhutiak, 2002). Certain aspects of the organizational development of UNDO are highlighted in the studies by Iryna Krasnodemska (Krasnodemska, 2016), Lev Kalyniak (Kalyniak, 2017) and Ihor Soliar (Soliar, 2008), who drew attention to the party structure, parliamentary activities and the search of a compromise with the Polish authorities. An important place in modern historiography is occupied by studies of the left-radical and socialist movements. Ihor Raikivskyi analyzed the activities of the USDP, its pro-communist tendencies and the role in the national movement of Galicia (Raikivskyi, 2015; Raikivskyi, 2018). Mariana Pyrih did the research on the activities of “Selrob” and the Ukrainian left-wing radical movement in Poland, in particular its social slogans and electoral strategy (Pyrih, 2016; Pyrih, 2012 – 2013). A significant contribution to the study of the Peasant Union was made by Tetiana Bortnik, who traced the process of the party's formation, its parliamentary activities, and its role in the socio-political life of Western Ukraine (Bortnik, 2020; Bortnik, Artymyshyn, 2022; Bortnik, 2025).

The socio-economic context of the Ukrainian parties activities is highlighted in the studies by Vitaliy Vyzdryk, dedicated to the agrarian reform and processes in the Galician countryside (Vyzdryk, 2016), and also in the research of Liudmyla Drahomyretska on the

cooperative movement (Drahomyretska, 2015). Certain aspects of the socio-political moods of the Ukrainian society are reflected in the studies by Mykola Haliv, Vasyl Ilnytskyi, and Anna Ohar (Haliv, & Ilnytskyi, 2017; Haliv, & Ohar, 2018; Haliv, & Ilnytskyi, 2019), who, based on the Polish police documents, analyzed the socio-political views of the Ukrainian intelligentsia and clergy. The Polish historian Ryszard Torzecki did the research on the Ukrainian issue in the politics of interwar Poland (Torzecki, 1989), and Vasyl Futala researched the Polish discourse on the Ukrainian issues (Futala, 2013). At the same time, the issue of social orientations of the Ukrainian parties, their vision of agrarian, labour, and cooperative policies has not yet become the subject of a separate comprehensive study.

The purpose of the study is to elucidate and analyze the programmatic goals and principles of the socio-economic guidelines of the Ukrainian legal parties, as well as to outline their main practical results.

Research Results. The territories of Western Ukraine, which was part of the Second Polish-Lithuanian Commonwealth during the interwar period, played a significant role in the development of the Ukrainian independence political movement. In contrast, Naddnyprianshchyna region, which after the years of the Ukrainian Revolution and the restoration of Ukrainian statehood found itself de facto part of the USSR, which suppressed any manifestations of national movements with totalitarian and repressive practices. In the 1920s and 1930s, the structure of Ukrainian society was mainly based on peasants, workers made up a small percentage, and the intelligentsia played an important role, being the leading force in the cultural, political, and economic movement (cooperation), although it was numerically inferior to other strata of society (Zaitsev, 2022, pp. 8–9).

According to the Ukrainian historian Oleksandr Zaitsev, due to the incompletely formed social structure of Western Ukraine, “class characteristics were not decisive in the establishment of political parties, even if their supporters and opponents claimed the opposite”. Partially sharing the thesis of the researcher Yu. Zaitsev regarding the absence of class orientations in the establishment of Ukrainian parties, let us consider the social programs of Ukrainian parties, which can be divided with some conditionality by ideological directions, or by the form of activity – legal and illegal (Zaitsev, 2022, pp. 11–12; Voitovych, & Kasaraba, 2026, p. 88).

In 1922 the Ukrainian political class of Eastern Galicia boycotted the elections to the Polish Sejm and Senate in order to prevent the official affirmation of the Polish sovereignty over the region and to create the image of unconditional loyalty of the Ukrainian public to the new Polish state for the world community (Zaitsev, 1999, p. 99). In the Ukrainian political life, according to the definition of the Ukrainian historian Lev Kalyniak, until the mid-1920s, “for some time, representatives of the first Ukrainian political organization, founded back in 1890 – the Ukrainian Radical Party, dominated. In 1923, at its first Congress after the war, the Ukrainian Radical Party adopted a political program, where it declared itself as “the organization of the working masses, standing on socialist positions and striving to implement its program in an independent Ukrainian state with the republican system and the power of all working people”. Therefore, the main electoral base of the URP was peasantry, moreover, the party program also provided for land reform without redemption: the land was to be alienated in favour of peasants (Kalyniak, 2017, p. 423). According to police reports from Lviv district eldership, the URP activists were particularly active in organizing peasant veches. On July 7, 1924, the URP in the village of Hai near Lviv convened a large peasant veche with the participation of Ivan Prokopiv, a delegate of the party’s main board. A number of important

issues were discussed at the meeting, including the possibility of carrying out an agrarian reform, and the Polish policy of settlement was criticized (Kalyniak, 2017, pp. 423–424).

In the first half of the 1920s in Western Ukraine, a significant role in the political life was also played by the Ukrainian Social Democratic Party, which emerged in 1899 and promoted national and social rights, primarily of the Ukrainian workers. The USDP boycotted the Polish census of 1921 and the elections of 1922, while Sovietophile sympathizers who believed in the policy of “Ukrainization” joined the party ranks and actively professed pro-Bolshevik ideas (Raikivskyi, 2015, pp. 55–56). In May 1922, the party split and its leaders Lev Hankevych, P. Buniak and Ivan Kvasnytsia left the party, the communists openly seized the levers of influence in the party. On the eve of the meeting of the Entente Council of Ambassadors – on March 18, 1923, the VI Congress of the USDP was held in Lviv. The results of the party Congress were the adopted documents – “Declaration of the USDP Congress on Eastern Galicia”, in which the USDP politicians condemned the decision of the Entente Council of Ambassadors; “Resolution on the Current Political Situation”, in which the USDP activists emphasized that “the liberation of the proletariat from both social and national slavery is unthinkable within the framework of the capitalist system and ... the unification of all Ukrainian lands into one socialist Soviet republic in alliance with the already existing socialist Soviet republics can only occur after the victory of the proletariat over the bourgeoisie”. The USDP activists also set as their goal the “elimination of the capitalist system” in Western Ukrainian territories, through the nationalization of industry and banks, the socialization of land, and the establishment of a tax for the wealthy. They also proposed “the reunification of Western Ukrainian lands with the Ukrainian SSR as part of the federal Union with all eastern Soviet republics” (Raikivskyi, 2015, p. 56).

It is also worth noting that the leadership of the USDP at the meeting on March 20, 1923, adopted the resolution “To the Ukrainian Working Masses of Eastern Galicia, Volhynia, Kholmshchyna, Pidliashshia and Polissia”. This address noted that the party Congress had approved the proletarian class nature of the policy (Raikivskyi, 2018, pp. 57). Therefore, after the 6th Party Congress, the USDP, according to the definition of a researcher I. Raikivskyi, turned into a legal superstructure of the Communist Party of Eastern Galicia-Communist Party of Western Ukraine. Due to the clear pro-communist orientations of the party, its leadership, and local organizations, the Polish authorities decided to liquidate the party and carried out this intention on January 30, 1924 (Raikivskyi, 2018, pp. 135).

In the domestic policy of the Second Polish-Lithuanian Commonwealth, the national issue was one of the most acute, because more than 30% of the state’s inhabitants, according to the calculations of the Ukrainian historian Vasyl Futala, were of other ethnic groups (not the Poles), and almost half of them were the Ukrainians. Therefore, the study of the Ukrainian issue, and therefore political parties, took place in the 1920s and 1930s. It is also worth noting that during the period under study, Poland’s state policy combined a relatively democratic system with a state and political ethnic program of assimilation of the Ukrainian population of Eastern Galicia and Western Volhynia (Futala, 2013, p. 174; Medvid’, & Popp, 2025, pp. 118–119). During the period under study, the Nationalities Department of the Polish Ministry of the Interior supported research on national issues, including the Ukrainian issues. For example, in 1931 Raimund Rużycki, under the pseudonym M. Felinski, did the study on the cultural and socio-political activities of the Ukrainians. In it, he presented a historical and sociological typology of the Ukrainian legal parties: right-wing, centrist, and left-wing (Futala, 2013, p. 174). Among them, M. Felinsky singled out the Ukrainian National

Democratic Union (UNDO), whose activities were based on a nationwide character, but the main base of support was the intelligentsia, the bourgeoisie and the clergy of the UGCC (Futala, 2013, p. 174). In the collective study “National Minorities” of 1932, edited by Zygmunt Urbański, it was also noted that the leading role in the organizational unification of nationalists was played by the Ukrainian National Democratic Union, established on July 11, 1925 (Urbański, 1932, p. 30).

According to the definition of the Ukrainian historian, a researcher of the history of the formation of the UNDO, Ihor Soliar, in the second half of the 1920s, the UNDO “set itself the goal of developing a legal, Ukrainian socio-economic sector in Poland, on the other hand, it did not recognize the latter’s right to Western Ukraine. To support the program of negation in the Ukrainian society, the UNDO launched active propaganda activities” (Soliar, 2008, p. 177). Therefore, the main social guidelines of the UNDO became the protection of peasantry and comprehensive support for its economic initiatives, along with support for the intelligentsia and entrepreneurs, which was combined with the struggle for broader rights of the Ukrainian community. According to the definition of the Ukrainian historian Yuriy Cherchenko, “the UNDO was the liberal party that advocated constitutional democracy, opposed the assimilationist policy of the Polish state, the Polish colonization of the Ukrainian lands, and at the same time called for the “normalization” of Polish-Ukrainian relations” (Cherchenko, 2019). Similar theses were also expressed by the researcher Iryna Krasnodemska, also emphasizing that the UNDO activists managed to establish a broad organizational network based on grassroots, district, and county branches, so party members were in contact with leaders, in particular by regularly convening county conferences. In addition, a number of Ukrainian cultural, educational, and economic organizations were under the influence of the UNDO; the magazines were published, including “Dilo”, “Svoboda”, “Economic and Cooperative Magazine” and the others (Krasnodemska, 2016, p. 89).

The Ukrainian researcher of the cooperative movement Liudmyla Drahomyretska noted that the organizational and party work of the UNDO was closely linked to the development of the cooperative movement, in particular, party members promoted the establishment of cooperative organizations. For example, at the end of 1926, Lviv voivode claimed that in Stryi district of Stanislaviv province, the positions of the UNDO were strong, which had influence on the majority of cooperatives in the district. Also, the Ukrainian ambassadors and senators who were members of the UNDO (O. Lutsky, I. Blazhkevych, S. Kuzyk, M. Halushchynsky) actively promoted the idea of developing the Ukrainian cooperation among the general public (Drahomyretska, 2015, p. 116).

Another important direction of the UNDO’s activity was the protection of the Ukrainian cooperators from administrative pressure of the Polish authorities. In particular, in the second half of 1927, the discussion began on a government bill on the introduction of trade books by merchants, which stated that “joint-stock partnerships, limited partnership-stock partnerships must keep their books in Polish, all others who trade (merchants) if they do not keep them in Polish, may keep their books in any other European language” (Tselevych, 1927, p. 1). This bill outraged part of the Ukrainian public, in particular, the UNDO Secretary Volodymyr Tselevych noted that this bill violated the right of the Ukrainians to autonomy in private, economic and other matters. Therefore, the politician emphasized that the UNDO would wage the struggle and called on other political forces, economic institutions and cooperatives to join it (Tselevych, 1927, p. 1).

On September 3, 1927, at the insistence of the UNDO, the meeting of “Narodna torhivlia”, “Centrebank”, “Maslosoyuz”, the Revision Union of Ukrainian Cooperatives (RSUK),

“Centrosoyuz”, “Silskyi Hospodar” of the Chervona Kalyna publishing house, representatives of the Dnister Bank, “Zemelny Bank Hypotechny”, and the Zemlia Society was held in Lviv. At the meeting, the plan was adopted to counter the bill: to prepare an interpellation in the Sejm together with the Ukrainian Parliamentary Representation, to send a memorial to the Prime Minister Józef Piłsudski, and to hold mass protests (Drahomyretska, 2015, pp. 116–117).

The Ukrainian Ambassador to the Sejm Serhiy Khrutsky (a member of the UNDO) and ambassadors from the Ukrainian Club in the Sejm appealed to the Chairman of the Council of Ministers, the Minister of Internal Affairs, the Minister of Treasury (Finance) and the Minister of Justice (Justice) regarding the violation of the rights of the Ukrainian language in economic institutions, emphasizing that this bill threatened the existence of numerous economic institutions and cooperatives of national minorities, including the Ukrainians (*Za prava ukraïnskoi movy*, 1927, pp. 1–2). On March 22, 1928, the President of Poland adopted the law regulating the activities of joint-stock companies. This regulatory act unified the provisions on the establishment of joint-stock companies, outlined the procedure for establishing a company, mandatory statutory elements, documents on the division of authorized capital, management structure, etc. This document does not contain clear references to the language of office work (*Rozporządzenie Prezydenta Rzeczypospolitej*, 1928a). However, on March 22, 1928, the law on “Agricultural (Agrarian) Chambers” (*in Polish – izby rolniczy*) was also adopted, which established the creation of a network of agricultural chambers, in accordance with administrative divisions, which were mainly intended to represent the interests of agriculture, promote its development, and communicate with the authorities. Agricultural (agrarian) chambers were established as organizations of a local public self-government and as a public entity, operating within the framework of laws and its own charter. After all, they united peasants and landowners into one self-government body. Polish was the language of official business. Participation in these chambers was mandatory, and an authorized representative of this agrarian chamber was also a member of the Cooperative Council established by the state (Visyn, 2018, p. 170; *Rozporządzenie Prezydenta Rzeczypospolitej*, 1928b; Muzyka, Vuityk, Kushchak, Domanskyi, & Solomonko, 2018, pp. 34–35).

In the first half of the 1920s, as noted by the Ukrainian historian Vitaliy Vyzdryk, the Polish government gradually carried out agrarian transformations through the voluntary parceling of land ownership by large landowners and the formation of farms by the Polish settlers in the southeastern voivodeships of the Second Polish Republic. It is worth noting that the establishment of these farms took place simultaneously in the course of the Polish settler colonization (Vyzdryk, 2013, p. 150). The “Law on the Principles of General Voivodeship Self-Government, in Particular of Lviv, Ternopil and Stanislav Voivodeships” adopted by the Sejm on September 26, 1922, provided for self-government in these voivodeships in the areas of religion, education (except for higher education), charitable affairs, general construction (including the development of roads and local railways), agrarian issues (except for land reform), support for local industry, and the voivodeship budget (Yukhymyuk, 2002, pp. 181–182). However, the actual rights of the Ukrainian peasants to receive parceled-out land were significantly limited (Kadeniuk, 2018, pp. 98–99). According to V. Vyzdryk’s calculations, “in 1921 – 1925, only 690 thousand hectares (5% of the area of big landowners) were parceled out in Poland, of which less than a third fell on state parcelization, which covered only 10% of the area of state plots. At the same time, landowners sold 472 thousand hectares of poorer land through private parcelization with great profit for themselves”. Thus, the issue of land distribution in Western Ukraine and Western Belarus became acute (Vyzdryk, 2013, p. 152).

The Ukrainian Socialist Association “Peasant Union” (established in 1924 in Chelm on the initiative of the Ukrainian socialist ambassadors, after a wave of repression by the authorities and the closure of the Ukrainian Social Democratic Party) also advocated the slogans of free land distribution (Bortnik, 2020, p. 11; Bortnik, & Artymyshyn, 2022, pp. 104–105). The new left-wing Ukrainian peasant party emerged on the initiative of the Ukrainian figures Pavlo Vasynchuk, Andriy Bratun, Mykola Chuchmai, Semen Makivka, and the others. During the spring and summer of 1924, local Ukrainians gathered in Volyn, Kholmshchyna, Pidliashshia, and Polissia to elect local delegates to the party’s founding congress. This founding Congress took place on August 17, 1924 in Chelm, bringing together 125 delegates and 17 guests (Bortnik, 2025, p. 108; Torzecki, 1989, p. 68; Kholmnyi povitovy Zizd, 1924, p. 2). As a result, the Congress approved a new party program and outlined its charter. According to these founding documents – “Program theses and organizational charter of the Ukrainian Socialist Association “Peasant Union” – the association positioned itself as a class organization that represents the interests of the Ukrainian peasants – “striving to abolish the exploitation of poor peasants and ensure that the peasantry has a role in political and social life” (Prohramovi tezy, n. d., p. 1). The “Peasant Union” also advocated replacing the capitalist relations prevailing at that time with the “socialist” system that would protect peasants, so the party suggested using all possible methods to achieve its goals so that the peasantry would become the most significant force in socio-political life (Prohramovi tezy, n. d., pp. 1–2).

In the region, the economic policy, according to the program of the “Peasant Union”, was mainly to be carried out on the following principles: free transfer of “non-labour” lands (landowners’, church, state) to landless peasants; land distribution through peasant committees, which were to be organized locally in villages; at the same time, it was proposed that part of the land remained in state ownership for the development of science; forests and subsoil were also to be transferred to state ownership in order to rebuild farms. Separately, the importance of state support for agriculture and the creation of peasant trade organizations for the sale of their goods, which would combat the exploitation of peasants, was emphasized (Prohramovi tezy, n. d., pp. 2–3). Labour relations and social protection were also on the program of the “Peasant Union”, in particular, the political association declared the introduction of an 8-hour working day, state security in the event of old age, disability and loss of job; labour protection for women and minors, and advocated the provision of free medical care to peasants and workers (Bortnik, 2025, p. 111).

Similar initiatives to resolve the land issue were declared by the Ukrainian Radical Party (URP) and the Ukrainian Party of Socialist Revolutionaries (UPSR), which united in 1926 into the Ukrainian Socialist Radical Party (USRP) at the party congress in Lviv (Vyzdryk, 2013, p. 152). As the Ukrainian historian Ihor Raikivskyi emphasized, after 1926 the social base of Ukrainian social democrats expanded significantly, which ultimately made it possible to form the Ukrainian socialist group “Vpered” (Forward)” on December 5, 1927. This group acted as the political organization and, together with the Ukrainian Socialist Radical Party, took part in the parliamentary elections of 1928, establishing the “Bloc of Ukrainian Socialist Peasant and Workers’ Parties”, which were united by the slogans and program “For Land and Freedom” (Raikivskyi, 2018, p. 135). In 1928 the USRP–USG party bloc “Vpered” (Forward)” took part in the elections to the Sejm and Senate and received representation – nine delegates to the Sejm and one to the Senate (Raikivskyi, 2018, p. 136).

On December 8–9, 1928, the party congress of the USDP was held in Lviv, which the organizers described as the “Ukrainian Socialist Congress”. It brought together 72 delegates

from Galicia. Lev Hankevych, speaking on behalf of the USDP, emphasized that their goal was “the Ukrainian socialism and the independence of the Ukrainian labour movement”, and therefore they strived for the united “Ukrainian Socialist Republic in the family of free socialist republics of other peoples”. In turn, another social democrat, Volodymyr Temnytsky, condemned the policies of the Bolsheviks in the USSR, because they came to power through violence, and it was not possible to build a new socialist system in this way. At the same time, V. Temnytsky emphasized the lack of joint work with the PPP (Raikivskiy, 2018, p. 137). In the context of the researched issues, it is also worth focusing on the speech of R. Skybinsky, who emphasized that it was necessary to establish the work of the USDP in workers’ unions, which would demonstrate the unity of the class professional movement. The activist also emphasized that the Ukrainian Social Democrats were focused only on the workers, and therefore had no opportunity to influence the peasantry. Therefore, he called on the Congress to agitate among the workers the idea of creating autonomous Ukrainian trade unions within the trade union organizations that had already operated in the Polish state (Raikivskiy, 2018, p. 138).

In 1925, the Second Polish Republic adopted a land reform, which was the result of many years of parliamentary discussions on key milestones in the country’s economic development. The Law on the Implementation of the Land Reform of December 28, 1925, contained the following main postulates: “1) the right to private property; 2) the creation of new self-sufficient farms; 3) the consolidation of unviable small farms; 4) the creation of farms in the countryside for the cultivation and sale of agricultural products; 5) the establishment of agricultural colonies near cities and industrial centers; 6) the allocation of suitable land for agricultural schools” (Lesyk, 2022, pp. 132–133). As the Ukrainian researcher and jurist Oksana Lesyk aptly noted, in 1925 the implementation of the land reform became one of the symbols of the restoration of Poland’s independence, while at the same time, “The Land Law of 1925 became a political compromise, and therefore protected the interests of only certain groups of the population, promoting settlement and parcelization” (Lesyk, 2022, pp. 146).

In his research the Ukrainian researcher Vitaliy Vyzdryk convincingly argued that the unsatisfactory results of parcelization led to the fact that the Polish government was forced to adopt a new law on the implementation of agrarian reform. V. Vyzdryk cited the data from the Lesser Poland Agricultural Society, in particular, that “by 1926, 10,037 farms of Polish civilian colonists had been created in 37 counties of Lviv, Ternopil and Stanislaw voivodeships”. And according to the historian’s calculations, “in 1919 – 1929, more than 77 thousand farms of the Polish peasants were established in the Western Ukrainian voivodeships, who owned more than 600 thousand hectares of land”. These materials demonstrate that the agrarian reform and the associated settler colonization in Galicia were mainly aimed at solving the problem of agrarian overpopulation in the Polish regions, and at the same time at strengthening the Polish economic influence in the Western Ukrainian territories (Vyzdryk, 2016, pp. 16–17).

The UNDO could not remain aloof from the agrarian issue, so in July 1925, at the party congress, the slogan of the struggle for the transfer of land plots of large owners to the private property of peasants without redemption was put forward, especially those who were landless (Vyzdryk, 2013, p. 152). The UNDO consistently defended the position of protecting the economic interests of the Ukrainian population, which suffered from the implementation of the agrarian reform. On September 24, 1925, the UNDO prepared a letter-call to the local party centres and the Ukrainian peasantry to organize mass *veches* on October 11–18, 1925 to protect “the Ukrainian land, the national and economic state of the estate, to begin creating county and village committees for the defense of the native land, and to collect

signatures against the land reform”. Also, a member of the Central Committee of the UNDO, Julian Pavlikovsky, even wrote a special brochure “In Defense of the Native Land” with the aim of spreading propaganda among the peasants. From October 1925, a series of protest veches took place, which took place in most counties of Lviv and Ternopil voivodeships (Kuhutiak, 2002, pp. 332–333).

The Ukrainian researcher Mykola Kuhutiak, characterizing the veche movement in defense of the economic rights of the Ukrainian peasants in 1925 – 1926, noted that this movement was “one of the largest demonstrations of the Ukrainian peasantry after World War I” (Kuhutiak, 2002, p. 334).

The UNDO report and program of November 16, 1926 outlined the program of the association’s activities, in which a separate place was given to “economic and social affairs”. The UNDO advocated the struggle for “the expropriation of large estate lands without redemption and for their transfer to the landless”, called for the expansion of the Ukrainian industry, while at the same time advocating the transfer of large factories and industrial enterprises to state ownership and ensuring workers “a proper share in the profits of labor, and for the legal protection of workers from exploitation; it promoted the development of trade, especially cooperation; and also advocated a change in the taxation system. It is worth noting that the last point of this part of the program emphasized that the UNDO was fighting for the legal right of workers (in agriculture and at industrial facilities) to an 8-hour working day, ensuring a day off on Sunday, providing workers with payments in case of illness, old age, as well as for widows and orphans, women during “maternity leave”, and separately advocated for the ban on the work of minors (Prohrama, 1926, p. 5).

After J. Piłsudski came to power in May 1926, the regime gradually transformed into an authoritarian system, essentially into a regime of the so-called “sanation” (rehabilitation). The previous government policy of “national assimilation” was transformed into the “policy of state assimilation of national minorities”, so the interests of the Ukrainian community were considered not through the prism of a comprehensive solution to the national issue, but as a set of problems in various spheres of life (economic, socio-cultural) (Krasivskyi, & Melishyn, 2008, pp. 167–168).

The Ukrainian researcher Mariana Pyrih noted that political life in interwar Galicia was distinguished by its ideological diversity, so a certain place among them was occupied by forces of the left-radical direction, in particular the Communist Party of Western Ukraine (CPWU). The CPWU emerged in 1923 as a result of changing the name of the Communist Party of Eastern Galicia, which was formed in Stanislaviv, in 1919. It is worth noting that although the CPSU represented a combination of communist ideas and the national issue, as a researcher M. Pyrih emphasized, “under the conditions of the Second Polish-Lithuanian Commonwealth, it did not have sufficient opportunities and support to realize itself in all spheres of the political life of the region. The conditions for the activity of left-wing radical forces were determined primarily by the fact that communist structures were banned by the Polish authorities, and therefore they operated underground” (Pyrih, 2012–2013, p. 407). Therefore, in order to legalize their activities, the Ukrainian left-wing radical groups, in particular “Narodna Volia” with the participation of the leadership of the “Peasant Union” and the CPSU, held the meeting on September 12, 1926, where they announced the importance of merging the parties. As a result, after lengthy negotiations between “Narodna Volia” and “Peasant Union”, a series of congresses, on October 10, 1926, the organizational design of the Ukrainian Peasant-Worker Socialist Association – “Selrob” was completed in Lviv

(Bortnik, 2025, pp. 161–167). At the end of this founding congress, a joint statement to peasants and workers was adopted, which emphasized that this united party set as its goal the fight for socialism and “a system of working people, where there would be social, political and national equality of all people. Only socialism will free humanity from spiritual and material slavery... Only socialism will break the chains of national slavery. Our party is the peasant-worker party, because both peasant and worker are equally exploited by the plunderers of human labour, because both peasant and worker are equally stifled by the factory-landlord yoke. In unity is our strength...” (Bortnik, 2025, p. 168).

In general, the party’s ideology tended towards a socialist radical direction, focused mainly on the interests of “Ukrainian peasants and workers”. Therefore, the main goal of the party’s activities was declared to be the construction of a new socialist society, and therefore it envisaged the complete elimination of large-scale private land ownership and the socialization of the main means of production. However, since the party was mainly focused on supporting the peasants, the main emphasis was placed on the need to transfer land plots without redemption to the peasants and workers, and to receive compensation for the land (Pyrih, 2016, p. 62).

The part of the “Selrob” program regarding the social sphere included the struggle for the introduction of an eight-hour working day and weekly uninterrupted rest (42 hours). Separate emphasis was placed on the ban on involving children under 16 years of age in work, and a paid leave for women in connection with pregnancy and childbirth was advocated, and even a paid leave for two months before and after childbirth. The right to social security in case of disability was also defended. Another important area of activity was outlined as work on the implementation of sanitary legislation, mainly in combating social diseases, venereal diseases and alcoholism (Pyrih, 2016, p. 63).

Having resolved key issues regarding the organization of the party, “Selrob” began preparations for the elections at the end of 1927. Therefore, on December 31, 1927, the “Selrob” district election committees received detailed instructions from the leadership regarding the holding of district conferences, where district election committees were to be elected. The main place in the election campaign was given to peasants, who were the key support for the party. As a researcher M. Pyrih noted, in order to study the mood of the peasants, the “Peasant Union” developed “special questionnaires, which were intended to determine not only how the party centre was organized and operated and its influence among the peasants, but also the positions of its competitors and the general state of affairs in the county” (Pyrih, 2012–2013, pp. 407–409).

Conclusions. Thus, the Western Ukrainian territories that were part of the Republic of Poland during the interwar period became an important centre for the development of the Ukrainian political movement. However, during the period under study in the sub-Soviet part of the Ukrainian lands, the repressive and totalitarian policy of the USSR made any development of other ideological parties impossible.

The social structure of the Ukrainian society during the period under study was dominated by peasantry, the working class was at a somewhat weaker level, and intelligentsia played a significant role, although it was significantly inferior in quantity to other strata of society. Such a social structure with little differentiation and the policy of the Polish state together influenced the direction of political programs and strategies of parties mainly towards national political interests, which were combined with the social demands of the Ukrainian public.

The left-wing parties, in particular the Ukrainian Social Democratic Party, Selrob and the Peasants’ Union, advocated more radical socio-economic transformations based on

socialist ideas – elimination of large landholdings, transfer of land plots to landless and landless peasants without redemption, and advocated broader rights and social protection for workers. In contrast, centrist forces chose the tactics of legal political activity, combining the protection of national rights with the development of economic institutions, in particular the cooperative movement. The most successful was the UNDO, which established an extensive organizational network, while trying to use parliamentary levers of influence effectively. At the same time, they held mass actions, promoted the cooperative movement. Thus, the social component of the political programs of Ukrainian parties, despite ideological differences, combined mainly the orientation to solving the economic needs of the Ukrainians through solving the agrarian issue; declarations on the expansion of civil rights, social protection of peasantry and workers were also common.

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Liubomyr HUBYTSKYI

PhD hab (History), Associate Professor; Professor of the Department of Philosophy, Sociology and Political Science, Faculty of Law and International Trade, State University of Trade and Economics, 19 Kyoto Street, Kyiv, Ukraine, postal code 02156 (lubg@ukr.net)

ORCID: 0000-0002-8511-6461
Researcher ID: GLV-1919-2022
Scopus ID: 57920696300

Hanna MELNYK

PhD hab (History), Associate Professor of the Department of International Relations, Faculty of Law and International Relations, Borys Grinchenko Kyiv Metropolitan University, 13-B Levka Lukyanenka Street, Kyiv, Ukraine, postal code 04207 (h.melnyk@kubg.edu.ua)

ORCID: 0000-0003-3090-7212
Researcher ID: AAE-4711-2019
Scopus ID: 59496752200

Любомир ГУБИЦЬКИЙ

доктор історичних наук, доцент, професор кафедри філософії, соціології та політології факультету права та міжнародної торгівлі, Державний торговельно-економічний університет, вул. Кіото, 19, м. Київ, Україна, індекс 02156 (lubg@ukr.net)

Ганна МЕЛЬНИК

кандидатка історичних наук, доцентка, доцентка кафедри міжнародних відносин, факультет права та міжнародних відносин, Київський столичний університет імені Бориса Грінченка, вул. Левка Лук'яненка, 13-Б, м. Київ, Україна, індекс 04207 (h.melnyk@kubg.edu.ua)

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**ORGANIZATION OF AID TO SUFFERERS FROM THE HOLODOMOR
BY UKRAINIANS FROM ZAKERZONNIA IN UKRAINE, IN 1932 – 1933**

Abstract. *The purpose of the research is to search for intentions and deeds that testified to the human compassion and mercy of the Ukrainian diaspora of Zakerzonnia towards the population of the Ukrainian SSR, which found itself on the verge of life and death. **Research Methodology.** The research has been carried out on the basis of the approaches of objectivity, comprehensiveness, systematicity, general scientific methods (analysis, synthesis, generalization), historical methods (comparative, source analysis), as well as the methodology of cultural and social anthropology (functional and structural methods). **The scientific novelty** of the study consists in the fact that for the first time, based*

on archival materials, the main decisions and results of aid actions of the Ukrainian political, public, and religious organizations of Zakerksonnia aimed at informing, mass public events, and raising funds to help victims of the Holodomor of 1932 – 1933 in the Ukrainian SSR have been comprehensively covered. **Conclusions.** In 1933 the main vector of the Ukrainian moderate political and religious representation was the dissemination of information to the world community about the artificial Holodomor organized by the Bolsheviks and the implementation of a broad humanitarian campaign to raise funds to support those suffering from the artificial famine. The Ukrainian Greek Catholic Church, in particular the dioceses and parishes in Zakerksonnia and the Central Public Committee for the Salvation of Ukraine, which had representative offices in Lemko region, Posiannia, Lublin region, Chelm region, and Pidliashia regions, joined in the implementation of the support fund establishment. In the autumn of 1933 the main donors of the monetary collection were political, public, and religious figures, as well as collective contributions from communities, parishes, organizations, and monasteries. The Ukrainian community showed examples of humanity, empathy, compassion, and readiness to help a Ukrainian who was in a mortal danger.

Key words: Holodomor; Ukrainian SSR, aid, UGCC, Zakerksonnia, Poland.

ОРГАНІЗАЦІЯ ДОПОМОГИ УКРАЇНЦЯМИ ЗАКЕРЗОННЯ СТРАЖДАЛЬЦЯМ ВІД ГОЛОДОМОРУ В УКРАЇНІ 1932 – 1933 рр.

Анотація. Мета дослідження полягає у пошуках намірів і справ, що засвідчували діяльне милосердя української діаспори Закерзоння щодо українців УСРР, які потрапили в екзистенційну ситуацію, викликану штучним голодом 1932 – 1933 рр. **Методологія.** Дослідження здійснено на основі підходів об'єктивності, всебічності, системності, загальнонаукових методів (аналізу, синтезу, узагальнення), історичних методів (порівняльного, аналізу джерел), а також методології культурної та соціальної антропології (функціонального та структурного методів). **Наукова новизна** дослідження полягає у тому, що вперше на підставі архівних матеріалів комплексно висвітлено основні рішення та результати допоміжних акцій українських політичних, громадських, релігійних організацій Закерзоння, спрямованих на інформування, масові публічні заходи і збір коштів для допомоги страждальцям від Голодомору 1932 – 1933 рр. в УСРР. **Висновки.** Головним вектором українського поміркованого політичного та релігійного представництва у 1933 р. було донесення інформації до світової громадськості про штучний Голодомор, організований більшовиками та реалізація широкої гуманітарної акції щодо збору коштів на підтримку страждальцям від штучного голоду. До реалізації формування фонду підтримки долучилися Українська греко-католицька церква, зокрема, єпархії і парафії на Закерзонні та Центральний Громадський Комітет Рятунку України, що мав представництва на Лемківщині, Посянні, Люблінщині, Холмищині, Підляшші. Основними донорами грошового збору восени 1933 р. стали політичні, громадські, релігійні діячі, а також колективні внески громад, парафій, організацій, монастирів. Українська громада проявила зразки людяності, емпатії, співчуття, готовності допомогти одноплемінникові, який опинився у смертельній небезпеці.

Ключові слова: Голодомор, УСРР, допомога, УГКЦ, Закерзоння, Польща.

Problem Statement. Humanity has not been able to overcome the phenomenon of world famine in the 21st century. However, in the 20th century, famine caused by crop failure or economic hardships, at the initiative of the Bolshevik government, acquired a means of political, social, economic, demographic, and ethnic repression. The study of the Holodomor of 1932 – 1933 in Ukraine will be relevant all the time. All new directions of search and expansion of the geography of connections between victims and people ready to help will only clarify the understanding of the external circumstances and the inner world of the Ukrainian community in post-Soviet Ukraine and the Second Polish-Lithuanian Commonwealth.

Review of Recent Research and Publications. This topic has been tangentially studied by a number of authors who focused on the everyday life of the Ukrainian society under the Soviet conditions. In particular, Larysa Yakubova, based on archival materials, elucidated the

consequences of the collectivization process among peasants and representatives of ethnic minorities (Yakubova, 2006; Ukrainiske radianske suspilstvo, 2012; Yakubova, 2024), and demographic losses among peasants (Yakubovskiy, 2021; Yakubovskiy, 2024).

A group of scholars did not ignore the issue of the common fate of different peoples representatives, in particular, the Poles, under the conditions of dehumanization of relations between the state and representatives of the property-owning class – peasants, who were destined to play the role of living reservists (Kalakura, 2008; Zaretska, 2011). A separate significant aspect of the shared grief of the Holodomor was the search of a way out of mortal hardship, for which representatives of the Polish minority could count on help from their relatives or the Polish state.

In his research Robert Kushnezh focused on the political, social causes and consequences of the Bolshevik rule in Ukraine in general and in the Ukrainian countryside in particular (Kushnezh, 2020; Kushnezh, 2023). The author's position, based on materials from the Polish archives (the Archive of New Acts and the Central Military Archive), remains valuable, and consists in the fact that both Polish diplomats in the USSR (in particular, in Kharkiv and Kyiv) and Polish intelligence were well informed about the state of affairs in the Soviet Union in 1932 – 1933. In the studies by Henryk Stroński, we encounter a balanced approach to the fate of the Polish population in Ukraine under the Bolshevik rule (Stroński, 2000; Stronskiy, 2017; Stroński, 1998). It is important that the author points at the everyday behaviour of the Poles, who shared the fate of the victims of the Great Holodomor of 1932 – 1933 alongside the Ukrainians. The researcher focused on finding the ways to help the Poles.

The community and the person with a similar faith still have hope for the support of co-religionists, as was expected in the community of the Ukrainian Catholics in 1932 – 1933. Partially the scholars studied the relationship between the Polish Catholics and the Ukrainian Catholics in times of trial in their studies: Natalia Titova (Titova, 2008; Titova, 2007), Oleksandr Rublov (Rublov, 2011), Roman Podkur (Podkur, 2016).

The response to the fact of the suffering of the Ukrainian population of the Ukrainian SSR in 1932 – 1933 from an artificial famine, which was observed in public and political opinion, led to measures to organize moral and material assistance among the politicians and society of Western Ukraine and the foreign diaspora, as reflected in the research by Danylo Kravets (Kravets, 2019), Yaroslav Papuha (Papuha, 2008), Mykola Kuhutiak (Kuhutiak, 1994), Tamara Vronska, Tetiana Ostashko (Vronska, Ostashko, 2003).

The only way to escape from the Bolshevik terror of famine was through illegal migration to neighbouring Poland. It was the information published by illegal migrants who became witnesses to the inhabitants of Galicia, Volyn, Zakerzonnia, and the whole world through the media. Serhiy Humennyi (Humennyi, 2019) and Tetiana Boriak (Boriak, 2021) focused on these important aspects of saving people and bringing news from Ukraine enslaved by the Bolsheviks.

The purpose of the research is to search for intentions and deeds that testified to the human compassion and mercy of the Ukrainian diaspora of Zakerzonnia towards the population of the Ukrainian SSR, which found itself on the verge of life and death.

Research Results. The natural process of development of the Ukrainian ethnic group in the first half of the 20th century faced challenges of denial from the Great Russians, whose leaders had no alternative but to degrade the Ukrainian people to the status of executors of a foreign hostile will (Bolshevik, proletarian, Great Russian). All components of such an attitude were mandatory: a Ukrainian had to renounce his own origin, since a new cultural unit

was being formed – the Soviet person. All forms of resistance to the Great Russian Bolshevik government were persecuted through deprivation of the right to life, health, education, and restriction of the right to movement. Loyalty to the occupation government had to be as apparent as possible. The communist government began the process of exterminating the leading Ukrainian military, political, and cultural strata, and later the turn came for the main bearer of Ukrainian identity – the peasantry. This was after the Great Russian experience of receiving and accepting aid from the countries of the cultural world (in particular, the USA), which responded to the suffering of the Soviet peasants during the Holodomor of 1921 – 1923.

The reaction to the tragedy of the Holodomor of 1932 – 1933 in Ukraine among the Polish authorities and Ukrainian society, its parliamentary and extra-parliamentary representatives, turned out to be radically different. The Polish press received clear instructions not to actively publicize the phenomenon of famine in the Union of Soviet Socialist Republics and especially the scale of this phenomenon. The main motivation for this position of the media and the authorities of the Second Polish Republic was the fact of the signing of the Soviet-Polish non-aggression pact on July 25, 1932, after which the Poles behaved very cautiously in relations with their eastern neighbour – the USSR. Only the Ukrainian public of Galicia and other Ukrainian lands under the Polish rule, represented by leaders and ordinary citizens, reacted loudly to the tragedy of their compatriots on the other bank of the Zbruch River. To this end, public initiatives were launched to draw attention to the catastrophe, condemn the inhumane policies of the Soviet regime, and collect material aid for the starving. Divine services and memorial services for the victims of the famine in the churches of the UGCC received wide participation and publicity.

In the 20th century the Ukrainian people were forced to go through a unique experience, initiated by the bearers of the ideas of searching for a just world, some of whom did not see a crime in violence for the sake of the state (Bolsheviks), while others saw the victim as the cause of injustice, misery, and suffering (Western democracies).

At the end of 1932 Father O. Orsky asked a question, the answer to which was not obvious to him, which is reflected in the columns of “Przemyśl Diocesan News”. In O. Orsky’s work, the dichotomy of profit (enrichment) and restriction of profit, provision of basic needs, was not resolved and almost justified socialist justice, which supposedly had the potential to become a real alternative to the free market, which suffered from the Great Depression. The Uniate analyst focused only on the possibility of the socialist alternative. But even a hundred years after the multimillion-dollar bloody victims of the socialist (Bolshevik, communist) experiment in Ukraine, which is suffering from the war with the heirs of the USSR – the Russian Federation – there remains a share of people who “long” for the Soviet past. It turns out that both making a forecast for the future based on the 15-year rule of the Bolsheviks (as of 1932) and summing up the consequences of almost 74 years of the Soviet rule was and is impossible due to a certain degree of bias regarding the size of the exploitation and equality in absolute poverty. Thus, according to the results of a sociological survey in January 2023, 12% of the population of Ukraine negatively evaluated the collapse of the USSR, with 23% in the south and 20% in the east (Andalitska, 2023). The survey was conducted among citizens of Ukraine in government-controlled territories.

The strategy of socialist construction was subordinated to the methodology of state continuity: the will of the ruler or the ruling union is always higher than the will of a person. Law, institutions, public opinion were subject to these strategies and methodologies. Ideas, resources, mechanisms that fell out of the general rule were subject to obstruction or even

extermination. It happened so to political parties, except for the Bolshevik party. The same fate awaited public associations, including religious ones. A person was gradually deprived of the opportunity for self-organization, losing horizontal connections. The Bolshevik state forced the mimicry of state structures of peoples, public organizations of classes, and industries and services came under comprehensive control. There was a process of separating the producer from the means of production, alienating the source of law from the means of law-making and protection by law. The initiative remained with the state.

A degenerate person was born (degenerated). The process of transforming the hired hand (naimyt) Yarema into the haidamak Halaida (T. Shevchenko's "Haidamaks") was stopped. The state chose the direction of coexistence with millions of prisoners sentenced to free labour and millions of intimidated members of their families, limited in rights. However, the majority were those who either silently or loudly approved the guidelines of the Bolshevik state. There was only one way left – forcing Bolshevik "repentance" through the landlessness of the Ukrainian peasantry. The innocently guilty paid the highest price in the most perverse "class" way: through starvation, searching for food both in their own homes and in city garbage dumps, and transgressing human prohibitions – cannibalism. The reconfiguration (unification) of social relations, the change of attitudes implied the rejection of land ownership, the results of labour, self-organization, one's own views, and diversity. All that remained was the impasse of uniformity, of impersonality – work for the state institution, organization, enterprise; small joys about the minimum wage, a monotonous consumer basket. And the public position that was once defended and fought for at the squares turned into kitchen conversations that often ended in arrest, even for making a joke.

The state is a prison, and a person as a mechanical screw without a clan or tribe became an almost ideal place for the transformation of a person (name) into a number (a unit of statistical reporting). "Women will give birth again" (according to H. Zhukov), "the death of millions is statistics" (according to J. Stalin) – the principles that turned a person into a means, a function of the state machine. It was at this defining moment that the Prefect of the Congregation for the Doctrine of the Faith, Cardinal J. Ratzinger, the future Pope Benedict XVI, observed on March 15, 2000: "In their horror [the concentration camps] abolish face and history, turning a man into a number, reducing him to a cog in a vast machine. A man is only a function [...]. In our days, we must not forget that these camps were a prototype of the fate of the world, which risks adopting the same structure of concentration camps if it accepts the universal law of the machine" (Hontar, 2023).

The combination of the experience of Ukrainians as victims-resources, victims who are observed but not helped, with the experience of a part of the Ukrainian ethnic group that chose to cooperate with the enemy or the observing society, led to the emergence of traits of fear for life, uncertainty about the future, refusal of initiative, of self-defense, recognition of the authority of the invader's power, and the predominance of adaptation. A small portion of the Ukrainian population retained the capacity for resistance and compassion, which became the basis for organizing measures to help the needy and starving. This primarily concerned the Ukrainian communities west of the Zbruch River.

The articles in the Ukrainian newspapers of Bukovyna, Galicia, Volyn, Zakerzonnia, and the periodicals of the diaspora became a call to show humanity. Thus, we observe information about the state of affairs in "the red paradise" (the Ukrainian lands under the rule of the Bolsheviks) in the columns of newspapers published by the Ukrainian community of the city of Przemyśl. In particular, the newspaper "The Ukrainian Voice" ("Ukrainskyi Holos",

Przemyśl) of August 14, 1932, contained a letter from the Ukrainian woman resident of the Ukrainian SSR to her husband in emigration. The news item reported violence against the author, theft of her personal property, deprivation of ownership of her house and shoes, carried out by representatives of the Bolshevik authorities, which was accompanied by accusations: "...you are a kurkulka and your blood is kurkulska, a cursed Ukrainian you are, go to your husband, you dog, there you will walk among the bourgeois putting your shoes on" (Ukrainskyi holos, 1932, p. 16). A victim of the Bolshevik repressions also reported that "...people walk like old men and are bloated from hunger". It is clear that this woman's husband, who participated in the Ukrainian liberation struggles of 1917 – 1921 and was forced to emigrate, actively supported the aid initiatives of the Ukrainian community outside the USSR. In the editorial of the newspaper "The Ukrainian Voice" (Przemyśl) dated June 19, 1932, the editorial office condemned violent and deceitful socialist practices. The author of the article exposed the sources that became the financial basis of socialist modernization. Unacceptable for the Ukrainian intelligentsia were the facts that Moscow authorities "by force and terror took away the land from the Ukrainian peasants and ordered them, as if they were serfs, to work for collective farms and state farms for the Moscow Jewish proletariat... All these "achievements" of Moscow brought the rich, fertile Ukraine to the point where the standard of living of the Ukrainian population fell to a minimum... As a result of the merciless exploitation of Ukraine by the Moscow Bolsheviks, a terrible famine is looming, destroying millions of Ukrainian peasants and workers" (Ukrainskyi holos, 1932, p. 1).

The authorities of the Second Polish-Lithuanian Commonwealth within its own borders allowed and facilitated the manifestation of acts of humanity among citizens, which also applied to the behaviour of customs officers, who, under certain circumstances, were even allowed by the state not to collect duties when postal parcels with gifts for personal use crossed the border (based on a regulation of the Ministry of the Treasury dated September 20, 1932) (CSHAUL, f. 162, d. 1, c. 1203, p. 4). Free customs clearance applied to parcels for citizens of all nationalities (the Poles, Jews, Belarusians, Ukrainians, etc., including those in Zakerzonnia) provided that they confirmed their poverty (difficult financial situation) and provided a "certificate of poverty" from local authorities. Of course, only those poor people who had relatives abroad could take advantage of this opportunity. The majority of such owners were the Jews, although sometimes the Ukrainians. For example, Solomon Meerswam from Wisnych Nowy near Krakow (Lemkivschyna), Moisey Tenzer from Ryaševo (Lemkivschyna), Josyp Vlečko from Nowy Sącz (Lemkivschyna), Abraham Polimer from Kolbuszow, near Ryaševo (Lemkivschyna) took advantage of this opportunity (CSHAUL, f. 162, d. 1, c. 1203, p. 19, 33, 88, 107).

The attitude of the Polish customs was opposite to the attitude of the Soviet secret services, whose representatives either did not allow aid to starving Ukrainians at all, or confiscated transfers from abroad or returned only a part of what was sent to the recipients. The situation was made worse by the fact that the Soviet authorities did not recognize the fact of the famine. This policy led to the inhumane behaviour of border troops, who shot the Ukrainians who tried to approach the boats (loaded with grain) that were being let in from the Polish side.

The population of the Second Polish-Lithuanian Commonwealth suffered from the Great Depression, which was reflected in the fall in prices for agricultural products. The decline in agricultural profitability directly affected the ability of the population to do good in the Chełm and Pidliashia regions. Thus, the report of the Public Security Department of the Lublin Voivodeship of January 5, 1933, referred to "a decrease in community donations

for public purposes”. No pressure from representatives of political forces yielded positive results: “even a little pressure aimed at provoking greater generosity in a certain direction yields completely different results” (SAVR, f. 46, d. 9a, c. 842, p. 2).

The Christian traditions of the Ukrainians bore fruit in the worst economic circumstances: Zakerzonnia helped finance the needs of a person in need – whether an emigrant, a veteran, an elderly priest, the poor, or an orphan (CSHAUL, f. 344, d. 1, c. 166, p. 7). Under such difficult economic conditions, it was necessary to conduct a large-scale campaign (in the autumn of 1933) to collect donations for the Ukrainians suffering from famine in Soviet Ukraine. But the Ukrainians of Zakerzonnia, as well as the inhabitants of Eastern Galicia, managed to give sacrificial money to the needy Ukrainian peasantry beyond the Zbruch river. The main organizational work in this matter was carried out by the Central Public Committee for the Salvation of Ukraine (Lviv, hereinafter – the Central Public Committee for the Salvation of Ukraine), initiated in July 1933 by the Ukrainian National Democratic Union, which organized a wide network of local committees and received support from other Ukrainian public organizations. In its appeal of July 25, 1933, the Central Committee of the Ukrainian People’s Commissariat of Culture and the Ukrainian SSR confirmed the facts of Bolshevik terror and exploitation that led to famine and millions of deaths among Ukrainians. These facts were condemned and an appeal was made to the entire cultural world for help (Dokumenty pro dopomohu, 2013).

In Zakerzonnia, the UNDO party-public network was able to participate in the cause of helping those suffering from famine in Soviet Ukraine actively. By 1932, UNDO had created 35 public party committees in Przemyśl County (CSHAUL, f. 344, d. 1, c. 239, p. 9). It was this structure that could be entrusted with the organizational work. In Przemyśl, there was the District Public Committee for the Salvation of Ukraine, whose chairman was Dr. Volodymyr Zahaikivych (an ambassador to the Sejm of the Polish-Lithuanian Commonwealth from Przemyśl and the Sian regions and a lawyer), and an engineer Ivan Skoropada served as a secretary (CSHAUL, f. 344, d. 1, c. 169, p. 39). In some settlements, the initiative to raise funds was taken by individual well-known people, such as in the town of Hrybów (in Lemko region) by a lawyer Vasyl Skrypchuk (CSHAUL, f. 344, d. 1, c. 169, p. 3). In Warsaw, the Committee for Aid to Hungry Ukraine was headed by Levko Chykalenko (CSHAUL, f. 344, d. 1, c. 169, p. 65). Representatives of other Ukrainian parties, in particular, the Ukrainian Peasant Party, also joined the mass celebration of the Day of Ukrainian National Mourning and Protest on October 29, 1933, calling on the rural community to be active participants in the event (Nove selo, 1933, p. 2).

A separate but significant reason for the economic decline of the Ukrainian peasantry was natural disasters. Thus, in the autumn of 1933, part of Hrybów deanery (Novy Sanch county, Lemko region) “was hit by hail and caused great damage, so that a general collection campaign would have been difficult for this reason” (Povidomlennia advokata, 1933). According to the conclusion of a lawyer Vasyl Skrypchuk from Hrybów, people could join the activities to collect material aid for the victims of the Holodomor of 1932 – 1933 in Soviet Ukraine, and in the communities of Lemko villages “1) Biltsarewa and Hrybów; 2) Banytsa parish; 3) the village of Czertyzhne; 4) Berest parish; 5) the village of Poliany; 6) Brunari Vyzhny parish; and the villages: 7) Brunari Nizhny, 8) Jaskowa; 9) Czarna; 10) Izby parish; 11) Bilyczna (nowadays headed by the parish priest from Banytsa); 12) Kamiana (nowadays headed by the parish priest from Berest); 13) Korolewa Ruska parish and the village of 14) Bohusha; 15) Snitnytsia parish and the village of 16) Stawyscha; 17) Florinka parish,

and 18) the village of Vafka; 19) Chorna parish and 20) the village of Perunka” by the will of the Przemyśl Greek Catholic consistory on October 29, 1933 (and with the permission of the Polish authorities) a divine service was held, reading of pastoral letters on the topic of the famine in Greater Ukraine, citizens fasted until 6 o'clock in the evening. The initiative to inform the population of the specified region about the criminal policy of the Bolshevik government belonged to the Ukrainian Greek Catholic Church, as a lawyer V. Skrypchuk testified to this and requested the Central Committee of the Ukrainian Church to grant him the authority to establish a local branch of the Central Committee of the Ukrainian Church.

Extensive preparatory work for the implementation of this action was carried out with the involvement of church mass media. Thus, on October 17, 1933, in the columns of the newspaper “Przemyśl Eparchial News” Metropolitan Andrey Sheptytsky, bishops Hryhoriy Khomyshyn, Josafat Kotsylovsky, Hryhoriy Lakota, Ivan Liatyshevsky, Ivan Buchko addressed the faithful with a call “to fasting, mourning, prayer and good deeds to ask from heaven for God’s mercy for our suffering and starving brothers” (*Peremyski yeparkhialni vidomosti*, 1933, p. 98).

The Ukrainian Greek Catholic Church was the largest contributor to the collection of donations. Thus, out of 371 donors (individual or collective), parish governments made 112 donations, individual churches organized 71 collections, reverend fathers made 64 donations, district committees for the salvation of Ukraine made 10, institutions and societies made 29, and private individuals (individuals and collections) made 85. As we can see, the largest number of donations was made by parish governments. The calculations were made based on the Statement of Victims of the Starving in Ukraine (CSHAUL, f. 344, d. 1, c. 351, p. 42 and next). The reporting document does not indicate the currency in which the donations were made. In our opinion, the reporting was conducted in the currency unit that was current at that time in the Second Polish Republic – the Polish zloty. In total, all donors gave a respectable amount – 11,058.21 (probably Polish zlotys). Among the donations: Parish Governments provided – PLN 2,220.02, church collections – PLN 1,713.29, Reverend Fathers (personally and collections) – PLN 1,999.18, county committees for the salvation of Ukraine – PLN 741.35, Institutions and Societies – PLN 2,049.72, private individuals – PLN 2,334.04. In monetary terms, private individuals showed the greatest sacrifice.

Among the donors, a significant share was made up of benefactors from the Ukrainian towns and cities and villages of Zakerzonnia. Donations were made by all the listed groups and individuals from these lands: Parish Governments allocated – 191.74 PLN or 8.6% of this group of donations, church collections – 156.48 PLN or 9%, Reverend Fathers (personally and collections) – 753.3 PLN or 37.7%, County Committees for the Salvation of Ukraine – 26.68 PLN or 3.6%, Institutions and Societies – 10 PLN or 0.5%, private individuals – 603.35 PLN or 26%. In monetary terms, the greatest sacrifice was made by private individuals. Personal and collective donations from Zakerzonnia region provided PLN 1,740.8 or 16% of the total amount of donations.

Indeed, donations from the villages of Zakerzonnia were not large, as the general financial situation of rural communities was affected by the economic hardship caused by the Great Depression. Thus, the parish government of the village of Balyhorod (Podkarpattia Voivodeship, Liski County) managed to organize a collection for the amount of PLN 10, Bashnia dol. (Podkarpattia Voivodeship, Lubachiv County) – PLN 6, Dobra shlikhetska (Subcarpathian Voivodeship, Sianice County) – PLN 17.55, Long Catholic (Dolha) (Lublin Voivodeship, Biel County) – PLN 40, 78. There were also very small collections, such as in

the village of Lipie (Subcarpathian Voivodeship, Bieszczady County), where only PLN 3.5 was donated. (CSHAUL, f. 344, d. 1, c. 351, p.43, 44).

The churches of Zakerzonnia also actively participated in the charity campaign to raise funds for the Ukrainians in post-Soviet Ukraine who suffered from famine. In particular, the church of the village of Zaluzhe (Subcarpathian Voivodeship, Liubachiv County) collected 5 PLN, the village of Malkovychi (Subcarpathian Voivodeship, Przemyśl County) – 17.5 PLN, the village of Medyka (Subcarpathian Voivodeship, Przemyśl County) – 17.3 PLN, the village of Rokszyczy (Subcarpathian Voivodeship, Przemyśl County) – 6.96 PLN, etc. (CSHAUL, f. 344, d. 1, c. 351, pp. 46, 47).

The venerable fathers of Zakerzonnia personally and through collections managed to collect significant funds that were directed to the needs of starving Ukrainians in 1933. Thus, the parish priest from the village of Batychi (Subcarpathian Voivodeship, Przemyśl County) Father Pashkiv made a donation of PLN 5.95, the priest from the village of Wankowa (Subcarpathian Voivodeship, Lisk County) Father Maziar – PLN 20, the priest from the village of Wijske (Subcarpathian Voivodeship, Sianice County) Father Marynovych – PLN 25, the priest from the village of Złockie (Małopolska Voivodeship, Nowości County) Father Kochmar – PLN 81.13. The largest contribution among the clergy was made by the Greek Catholic Ordinariate in Przemyśl – PLN 427.50 (CSHAUL, f. 344, d. 1, c. 351, p.48, 49).

Among civil institutions and societies, employees of the Przemyśl “Mischchanska Kasa” contributed PLN 10, the Liubachiv District Committee for the Salvation of Ukraine – PLN 26.68. Private individuals from Zakerzonnia, who did not hide their names, also actively participated in the charity process, in particular, from Przemyśl, Mrs. Ivantseva – PLN 5, Mr S. Kropyvnytskyi – PLN 10, Mr. Pereyma – PLN 61.02 and PLN 174.68 (CSHAUL, f. 344, d. 1, c. 351, pp. 51, 53, 56).

The TsHCRU obliged the county committees and responsible organizations to deposit donations into the account of the Land Mortgage Bank (Lviv). As of December 31, 1933, these accounts contained 30.25 American dollars and 63 Polish zlotys (CSHAUL, f. 562, d. 2, c. 3666, p. 33, 37). It is important that among the administrative expenses of this bank there was a separate line item relating to donations, which in 1933 amounted to 3,436.80 Polish zlotys (CSHAUL, f. 562, d. 2, c. 3666, p. 107). But among the bank’s analyzed charitable contributions, there were no donations to benefit the starving in Ukraine.

The TsHCRU opened an account in the Land Mortgage Bank (Lviv) before the large-scale campaign was held on October 29, 1933, and already on October 17, the organization’s current account contained 6 Polish zlotys (CSHAUL, f. 562, d. 2, c. 3914, p. 71). Data from the bank reports by decade of the month make it possible to trace the periods of the most massive donations, the donor, the settlement from which the funds came, the organizations that carried out the collections. Part of these donations came from Zakerzonnia. Thus, from the bank’s cash reports for the first decade of November 1933, we learn that on November 3, 1933, a donation from the parish government of the village of Zalyszczuń (Poland, Lublin Voivodeship, Parczew County) in the amount of 42.5 zlotys was received on the account of the Central State Committee for the Local Government of the Republic of Poland (CSHAUL, f. 562, d. 2, c. 3916, p. 66). In the following days, the sacrificial activity continued. On November 9, the TsHCRU received a donation from N. Kowal from Rożniatw (probably Podkarpackie Voivodeship, Pereworsky County) in the amount of PLN 9.30. On the same day, a donation was received from the parish government of the village of Stanków (various locations – Lesser Poland Voivodeship, Nowości County; or Podkarpackie Voivodeship,

Bieszczady County) in the amount of PLN 7.06 (CSHAUL, f. 562, d. 2, c. 3916, p. 11), the parish government of the village of Luczyci (Poland, Podkarpacie Voivodeship, Przemyśl County) provided 28 zlotys, and the same government from Makhny (Poland, Lublin Voivodeship, Tomaszów County) donated 10 zlotys. The church actively demonstrated its sacrifice. Thus, on the same day, the Committee for the Salvation of Ukraine received a contribution to the cause of helping the starving from the churches of the village of Smolyhov (Poland, Lublin Voivodeship, Hrubieszów County) of 16 zlotys, from the village of Lyashki dol. (Poland, Podkarpacie Voivodeship, Yaroslav County) of 23 zlotys, from the village of Varilowice (Warylowytsia) (Poland, Podkarpacie Voivodeship, Yaroslavl County) of 23 zlotys. Donations were also made by individuals. For example, Father Petrytsia from the village of Toky (Poland, Podkarpacie Voivodeship, Jasiel County) donated 25 zlotys (CSHAUL, f. 562, d. 2, c. 3916, p. 11back).

The amounts of donations seem insignificant, but considering the prices of agricultural goods at that time, we can understand how many tens, if not hundreds of thousands of lives the Ukrainians of Zakerzonnia would have saved (provided that they had the opportunity to transfer donations in money or products to people who were starving in 1933). In November 1932 the prices of agricultural products in Zakerzonnia, namely in Lublin Voivodeship were the following: 1) rye per 1 meter from 14 to 17 zlotys; 2) wheat per 1 meter from 23 to 26 zlotys; 3) oats per 1 meter from 12 to 14 zlotys; 4) barley per 1 meter from 13 to 15 zlotys; 5) potatoes per 1 meter from 2.5 to 4 zlotys; 6) 1 kilogram of live weight of beef cattle from 80 to 95 groszys (SAVR, f. 46, d. 9a, c. 842, p. 2back).

Conclusions. The results of the research showed that the reaction of the Ukrainian population in Zakerzonnia to the tragedy of their compatriots on the other bank of the Zbruch river was identical to the actions of the Ukrainians throughout the free world, which led to the emergence of public initiatives aimed at drawing attention to the disaster, condemning the Soviet regime, and collecting material aid for the starving.

Requests from the Ukrainians (from the Ukrainian SSR) for material aid, as well as messages from refugees from Ukraine, recorded in the Ukrainian press, prompted calls and measures to highlight the causes of the suffering of Ukrainians in post-Soviet Ukraine and the search of ways to help their compatriots with all possible actions. Representatives of the Ukrainians in the Polish authorities of Zakerzonnia (primarily the Ukrainian Parliamentary Representation) actively participated in informing the public about the Holodomor of 1932 – 1933 and collecting aid among the Ukrainians of Galicia and Volyn. The positions of the Ukrainian political party representations in Zakerzonnia on the Holodomor of 1932 – 1933 corresponded to the tendencies of the political struggle in Galicia and Volyn, namely, moderate parties focused on political informing and collecting funds for the sufferers through the Central Committee of the Ukrainian People's Commissariat for the Elimination of Racial Discrimination, radical parties were inclined to use terrorist measures against the perpetrators. The left-wing parties, which had close contacts with the Bolsheviks, denied the very fact of the Holodomor.

The response of the Ukrainian Greek Catholic Church in Zakerzonnia to the crime of the Holodomor in Ukraine in 1932 – 1933 remained within the framework of a Christian response to life's challenges, such as: repentance, fasting, prayer, joint worship, and collection of funds to help the Ukrainians who suffered from this tragedy. In 1932 – 1933 the Ukrainian emigration circles that lived in Poland joined the activities of the Emigration Committee for Aid to the Starving under the Ukrainian Central Committee in Poland. However, the bulk

of the events and organizations were established by the leaders of the Ukrainian National Democratic Union and the Ukrainian Parliamentary Representation, in whose funds the main documents about the widespread action of October 29, 1933 were found.

Research prospects. A promising approach may be to study documents related to this topic and located in the archives of Warsaw, Przemyśl, Lublin, and Riashiv.

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Olexandr BURAVSKY

PhD hab. (History), Professor, Professor of the Department of World History, Zhytomyr Ivan Franko State University, 40 Velyka Berdychivska Street, Zhytomyr, Ukraine, postal code 10008 (buravskij@i.ua)

ORCID: 0000-0002-1847-4605

ResearcherID: AAR-1269-2020

Scopus ID: 58885865500

Igor VLASYUK

PhD (History), Associate Professor, Associate Professor of the Department of World History, Ivan Franko Zhytomyr State University, 40 Velyka Berdychivska Street, Zhytomyr, Ukraine, postal code 10008 (vlasyuk@zu.edu.ua)

ORCID: 0000-0003-4679-4101

ResearcherID: E-5163-2016

Scopus ID: 57847647200

Олександр БУРАВСЬКИЙ

доктор історичних наук, професор, професор кафедри всесвітньої історії, Житомирський державний університет імені Івана Франка, вул. Велика Бердичівська, 40, м. Житомир, Україна, індекс 10008 (buravskij@i.ua)

Ігор ВЛАСЮК

кандидат історичних наук, доцент, доцент кафедри всесвітньої історії, Житомирський державний університет імені Івана Франка, вул. Велика Бердичівська, 40, м. Житомир, Україна, індекс 10008 (vlasyuk@zu.edu.ua)

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**THE REPRESSIVE POLICY OF THE SOVIET REGIME AGAINST
THE CLERGY AND ANTI-RELIGIOUS PROPAGANDA IN ZHYTOMYR REGION
IN 1937 – 1938**

Abstract. *This article, utilizing archival documents and local periodicals, investigates the implementation of the repressive policy of the Soviet regime against the clergy in Zhytomyr region in 1937 – 1938. It examines the punitive actions carried out by the authorities against specific representatives of the Orthodox clergy in the region and elucidates the methods employed for anti-religious propaganda. The methodology of the research is grounded in general scientific principles and approaches, along with specialized and general methods. The civilizational approach is central to the research, allowing for a focus on factors associated with the Bolsheviks' anti-religious policy in*

Zhytomyr region in the 1930s. General scientific principles applied include objectivity, historicism, and multi-factor analysis. Specialized methods of historical inquiry employed are the comparative historical, problem-chronological, and historical typological methods. The research was partially conducted in the context of social history. **The scientific novelty** of this research lies in clarifying the specifics and features of the Soviet regime's repressive policy and the methods of anti-religious propaganda in the region based on archival materials and local periodicals from the specified period. It also elucidates the fates of lesser-known religious ministers in Zhytomyr region in the 1930s. **Conclusions:** The policy of repression against religion and its figures, particularly the Orthodox clergy, in Zhytomyr region in the 1930s was an integral component of the totalitarian all-Union policy of the Stalinist regime. In Zhytomyr region, this was compounded by the campaign against supposed spies allegedly working in the interests of neighbouring Poland, given the region's border position. The clergy who fell victim to the repressions in the region were posthumously rehabilitated only during the Khrushchev Thaw. Appeals from their wives and children often served as the impetus for the rehabilitation of the unjustly convicted local Orthodox clergy. The authorities eventually conceded that the so-called counter-revolutionary monarchist organizations in the region did not, in fact, exist in the 1930s; they were fabricated to provide grounds for the condemnation of Orthodox clergy in the city of Zhytomyr and the wider region. The authorities relentlessly pursued an ideological struggle against religion and its representatives in Zhytomyr and the surrounding villages, portraying them in the local press (notably, the newspaper *Radianska Volyn*) as conscious enemies of the Soviet regime who allegedly hindered the economic and cultural development of contemporary society. In this struggle, the article authors consistently used offensive language directed at local priests, distorted religious sentiments, and cast doubt upon sacred concepts. It was paramount for the regime to indoctrinate the population with an atheistic spirit and shift social consciousness and attitudes in its favour. The tragic destinies of previously unknown priests who suffered under the repressive policies in the region attest to the cost of a human life during those dreadful years and compel a deeper understanding of the essence of the Soviet totalitarian regime.

Key words: repressive policy, clergy, church, anti-religious propaganda, Soviet regime, Zhytomyr region.

РЕПРЕСИВНА ПОЛІТИКА РАДЯНСЬКОЇ ВЛАДИ ПРОТИ СВЯЩЕННОСЛУЖИТЕЛІВ І АНТИРЕЛІГІЙНА ПРОПАГАНДА НА ЖИТОМИРЩИНІ У 1937 – 1938 рр.

Анотація. У статті на основі архівних документів та місцевої періодики з'ясовано проведення репресивної політики радянської влади проти священнослужителів на Житомирщині у 1937 – 1938 рр. Досліджено каральні дії влади проти окремих представників православного духовництва на цих теренах. Висвітлено методи проведення антирелігійної пропаганди в регіоні. **Методологія дослідження** ґрунтується на загальнонаукових принципах та підходах, спеціальних і загальних методах. Ключовим у дослідженні є цивілізаційний підхід, що уможливив зосередити фокус уваги на факторах, пов'язаних з антирелігійною політикою більшовиків на Житомирщині у 1930-х рр. Серед загальнонаукових принципів використано принципи об'єктивності, історизму та поліфакторності. З-поміж спеціальних методів історичного пізнання – порівняльно-історичний, проблемно-хронологічний та історико-типологічний. **Наукова новизна дослідження** полягає у тому, що на основі архівних матеріалів та місцевої періодики зазначеного періоду з'ясовано специфіку й особливості репресивної політики радянської влади, методи проведення антирелігійної пропаганди у регіоні, долі маловідомих релігійних служителів на Житомирщині у 1930-х рр. **Висновки.** Політика репресій проти релігії та її діячів, зокрема, православного духовенства, у Житомирській області в 1930-х рр. була складовою загальносоюзної тоталітарної політики сталінського режиму. На Житомирщині вона доповнювалася боротьбою проти т. зв. штигунів, які нібито працювали в інтересах сусідньої Польщі, оскільки область займала прикордонне становище. Священнослужителі, які стали жертвами репресій в регіоні, бути реабілітовані посмертно лише у період хрущовської відлиги. Часто звернення їхніх дружин та дітей служувало поштовхом до реабілітації несправедливо засуджених представників місцевого православного духовенства. Влада визнала, що контрреволюційних монархічних організацій в регіоні у 1930-х рр. насправді не існувало, вони були вигадані для того, щоб мати підстави засудити представників православного духовенства

м. Житомира та регіону. Влада не переставала вести ідеологічну боротьбу проти релігії та її представників у Житомирі та селах області, зображуючи їх на сторінках місцевої преси (як-то газети “Радянська Волинь”) як свідомих ворогів радянської влади, які нібито завдавали шкоди господарському та культурному розвитку тогочасного суспільства. У цій боротьбі автори статей постійно вживали образливі вислови на адресу місцевих священників, спотворювали релігійні почуття людей, вносили сумніви у їхні святі поняття. Владі важливо було виховати населення в атеїстичному дусі, змінити свідомість та настрої у суспільстві на свою користь. Доли окремих раніше невідомих священників, які постраждали від репресивної політики влади в регіоні, засвідчують, якою була ціна життя людини у ті страшенні роки, і спонукають до глибшого розуміння сутності тоталітарного радянського режиму.

Ключові слова: репресивна політика, духівництво, церква, антирелігійна пропаганда, радянська влада, Житомирщина.

Problem Statement. One crucial research vector is the study of regional aspects of the Bolshevik regime’s repressive policy in the 1930s. Current research objectives include, but are not limited to, clarifying the specifics of the Soviet regime’s repressive policy toward the Orthodox clergy and other confessions in Zhytomyr region in the 1930s, and providing an objective analysis based on unpublished archival materials and recent scholarly works. Equally important is the study of the lives of previously unknown clergymen who became victims of political repression in this region, and the restoration of their good memory.

Review of Recent Research and Publications. The repressive policy of the Soviet regime toward the church in Zhytomyr region in the 1930s has been reflected in the works of Serhiy Zhylyuk, Tetiana Rafalska, Viktor Bernatskyi, Oleksandr Buravsky, Ihor Vlasiuk, and the others. The application of punitive actions by the Soviet regime against the Orthodox clergy in Zhytomyr region in the 1930s was traced in the scholarly work of Professor Serhiy Zhylyuk (Zhylyuk, 2002).

The monograph *Anti-Religious Policy of the Bolsheviks in Volyn-Zhytomyr Region in the 1920s–1930s* by Viktor Bernatskyi, Serhiy Zhylyuk and Valeriy Sheretyuk (Rivne, 2017) thoroughly details the scale of repressions against the clergy and faithful of the UAOC and ROC. The authors state that in the mid-1930s, punitive measures such as the deprivation of the right to religious activity, imprisonment, eviction, deportation, and execution were actively employed (Bernatskyi, Zhylyuk, & Sheretyuk, 2017).

Tetiana Rafalska, analyzing the Soviet regime’s repressive policy against priests in Zhytomyr region in the 1930s, emphasizes that they were primarily accused of espionage in favour of Poland, counter-revolutionary activity, and participation in a “counter-revolutionary fascist organization” (Rafalska, 2010). The anti-religious policy of the Soviet regime in Volyn–Zhytomyr region in the 1920s – 1930s and the fates of the Orthodox clergy were also partially covered in the scholarly article by Oleksandr Buravskyi and Ihor Vlasiuk (Buravskyi, & Vlasiuk, 2016).

The collective scholarly work *Rehabilitated by History (Zhytomyr Region)* features the tragic fates of certain prominent representatives of the region’s Orthodox clergy in specific volumes, alongside brief reference data on their activities and sentences (Reabilitovani istoriieiu. Zhytomyrska oblast, 2006; 2010; 2013). A. Kyrydon’s monograph analyzes, *inter alia*, state-church relations in the Ukrainian SSR in the 1930s, the influence of Bolshevik ideology on societal consciousness, and the suppression of religious sentiments (Kyrydon, 2011).

Viacheslav Litynskyi devoted his research to the technologies of execution of death sentences by employees of the NKVD in 1937 – 1938, including in Zhytomyr region (Litynskyi, 2024).

The regional aspect of the problem of repressions of the Bolshevik authorities against Christian denominations, in particular in Podillia in the 1930s, was reflected in the scientific article by Anatoly Voynarovskiy, Natalka Zhmud, and Valentyna Hrebenova (Voynarovskiy, & Zhmud, & Hrebenova, 2024). Olha Kolyastruk's research is devoted to Soviet repressive measures and mass terror in Podillia (Kolyastruk, 2023).

Some modern studies are devoted to the problem of religiosity of the population in the Ukrainian SSR. In particular, Tetiana Havryliuk and Vladyslav Diatlov studied the motives of the population's religiosity and the influence of communist ideology on it (Havryliuk, & Diatlov, 2023).

The source base is defined by the research purpose and objectives and consists of a complex of documents, the unbiased analysis of which creates the conditions for the objective elucidation and analysis of this problem. To achieve the stated objective, unpublished documents from the State Archive of Zhytomyr Oblast (SAZhO) were analyzed to clarify the reasons for arrests, investigative procedures, and the fates of clergymen, church activists, and the faithful. Local periodicals from 1937 – 1938 were also analyzed to understand the nature and methods of the Soviet regime's anti-religious propaganda.

The purpose of the article is to ascertain the specific features of the repressive policy of the Soviet regime toward the clergy of Zhytomyr region in 1937 – 1938, as well as the anti-religious propaganda, and to highlight its consequences.

Research Results. In discussing the regional component of the totalitarian communist regime's repressions against religious figures of various churches and anti-religious propaganda, particularly in Zhytomyr region, it is vital to emphasize that these measures were distinctly integrated into the system of all-Union measures to combat real and imagined adversaries of the Stalinist regime (Shapoval, 2012, p. 163).

The intensive closure of churches in Zhytomyr region was a characteristic phenomenon of the 1930s. By way of example, the following churches were closed in the region in 1930: in the villages of Slipchytisi, Holovino, Shcheniieva of Cherniakhiv district, Holovino; and St. Michael's Church in Zhytomyr (Buravskiy, & Vlasiuk, 2016, p. 52).

By 1937, only 2 functioning churches remained in Zhytomyr city out of the 33 that had existed previously. Clergy who remained in the city were gradually evicted by the authorities to the border zone. Their overall situation was dire: they were forced to live with relatives or acquaintances, work odd jobs, or resort to begging (Reabilitovani istoriieiu. Zhytomyrska oblast, 2006, p. 40).

V. Bernatskiy provides information on the number of repressed priests in the Zhytomyr region as of 1937 – 1938: 283 representatives of the Orthodox clergy, of whom 193 were shot and 80 were serving sentences. As of 1937, 500 churches in the region had been closed in violation of existing Soviet legislation (Bernatskiy, 2016, pp. 127, 149).

The SAZhO files containing evidence of the unfolding repressions against the Orthodox clergy in Zhytomyr region in 1937 – 1938 reveal the fates of individual, lesser-known priests.

Havryliuk Oleksandr Vasyliovych, Archpriest of the Smolianka Church in Zhytomyr, was arrested on November 4, 1937, "for statements in defense of the enemies of the people Tukhachevsky and Yakir." The Troika of the UNKVS for the Zhytomyr region sentenced him to 10 years in labour camps on charges of "counter-revolutionary fascist agitation aimed at undermining the power of the Soviet Union" (SAZhO, f. R-5013, d. 2, c. 59, pp. 17, 23). According to a witness, in 1937, "when the enemies of the people, fascist spies, and traitors of the fatherland Tukhachevsky and Yakir were shot, the priest Havryliuk said: 'They were

smart people, they fought for the liberation of the people from the violence of the communists, and for that the communist-atheists shot them. The time will soon come when the people will destroy them” (SAZhO, f. R-5013, d. 2, c. 59, pp. 12, 16).

Dombrovskiy Artem Martynovych (born October 20, 1895), a native and former resident of Zhytomyr city, a priest, was arrested on April 17, 1938. He was accused of allegedly belonging to a counter-revolutionary monarchist organization and conducting anti-Soviet agitation, for which the Troika of the UNKVS for the Zhytomyr region sentenced him to the highest measure of punishment – execution by firing squad – on May 10, 1938. The sentence was carried out on June 3, 1938, in Zhytomyr. The case contains an inquiry from the priest's daughter, Liubov Artemivna Dombrovska, about her father's fate. He was rehabilitated in 1958 (SAZhO, f. R-5013, d. 2, c. 1834, p. 75).

Teodorovych Ivan Hnatovych, a resident of Zhytomyr city, a priest, was arrested by the UNKVS bodies for Zhytomyr region in Zhytomyr on April 11, 1938. On May 10, he was sentenced to execution by firing squad by the Troika of the UNKVS for Zhytomyr region, accused of participation in an anti-Soviet monarchist organization and preparing an armed uprising against the Soviet regime. The sentence was carried out on June 3, 1938. His burial place was not specified (SAZhO, f. R-5013, d. 2, c. 1834, p. 79).

In the case concerning the priest of the Skrahlivka village church, Berdychiv district, Zhytomyr region, Rubanovych Serhii Yosypovych (born 1874), a witness testified: “The priest of our village, Rubanovych Serhii, as early as 1918, before Petliura's arrival in Ukraine, traveled to Kyiv for a church congress, after which he preached sermons in the village in support of Petliura, for the liberation of Free Ukraine. On the feast of Epiphany, priest Rubanovych went around the houses with prayer and during these rounds conducted agitation against collectivization” (SAZhO, f. R-5013, d. 2, c. 1192, pp. 18–19). He was sentenced to 3 years in a concentration camp (Reabilitovani istoriieiu. Zhytomyrska oblast, 2013, p. 147).

Rudenko Yakym Korniiievych, a native of Zabolot village, Radomyshl district, a priest. According to the investigation files, he was ascribed to conducting counter-revolutionary agitation among collective farmers against the measures of the Soviet regime. His character reference specifically noted that “priest Rudenko gathered believers in his apartment during the Supreme Soviet elections, among whom he conducted counter-revolutionary agitation. He performed religious rites and maintained contact with reactionary elements and those repressed by the Soviet regime” (SAZhO, f. R-5013, d. 2, c. 14846, p. 10). An excerpt from the protocol No. 30 of the meeting of the Troika under the UNKVS for Zhytomyr region on November 27, 1937, testifies that Ya. K. Rudenko was accused of grouping counter-revolutionary, church elements and, under the guise of religious convictions, calling on them not to implement the decisions of the party and government, spreading slander against the Soviet authorities and collective farm construction, and forecasting the inevitability of war and the defeat of the Soviet regime. He was sentenced under Article 54 of the Criminal Code of the Ukrainian SSR to 8 years in a corrective labor camp (SAZhO, f. R-5013, d. 2, c. 14846, p. 18).

Romanovskiy Leonid Polikarpovych, priest of the Mshanets village church, Liubar district. The village council chairman's reference noted: “The local priest is deprived of electoral rights. Maintains broad ties with kulak and anti-Soviet elements. Incites peasants to leave the collective farm”. The protocol of the special session of the GPU Collegium of the Ukrainian SSR on July 28, 1933, reveals his conviction under Article 54-10 to 3 years of exile to the northern region (SAZhO, f. R-5013, d. 2, c. 13428, pp. 3, 16).

By the decree of the Assistant Operative Commissioner of the NKVD for the Zhytomyr region on June 20, 1938, the clergyman A. S. Mykhalevych, residing in Zhytomyr, was arrested for gathering people in the Vilsky church and conducting anti-Soviet agitation among them, maintaining ties with Polish landlords and “enemies of the people” Morozov, Bychkovskiy, and the others. He was charged under Articles 54-10 and 54-11 of the Criminal Code of the Ukrainian SSR. A. S. Mykhalevych died on August 27, 1938, while in Zhytomyr prison (SAZhO, f. R-5013, d. 2, c. 1822, p. 371).

T. Rafalska draws attention to the multi-ethnic composition of the population in Zhytomyr region and that the Bolshevik regime’s atheistic policy harmed believers of various religions and confessions. The author provides numerous examples of the authorities’ repressive actions against individual priests, suggesting that the schism within Orthodoxy facilitated the repressions against this church. For instance, the investigation file against Malyn priest K. Kulchytskyi was concluded in a single day; he was sentenced to 10 years of corrective labour for allegedly counter-revolutionary nationalist activity in favour of Poland. Investigations were often very brief, requiring only the signing of pre-prepared interrogation protocols (Rafalska, 2010, pp. 110–111, 115).

Archival files on repressed priests also contain applications from their wives in the mid-1950s requesting the local MVD bodies to review the case and rehabilitate them. They also appealed due to the necessity of receiving a pension from the eparchial administration. Specifically, one such case includes information about 56 convicted priests in Zhytomyr region in the second half of the 1930s. According to the case data, in 1938, the NKVD bodies in Zhytomyr region arrested, inter alia, the priest Yevdokymov Oleksandr Mykhailovych, who was charged under Article 54 (parts 10, 11) of the Criminal Code of the Ukrainian SSR and sentenced to the highest measure of punishment. The priest was accused of active participation and activity in an anti-Soviet monarchist organization. The NKVD used its methods to extract a personal confession from him that he had conducted agitation against the Soviet regime in villages in 1930, and in 1935, he was allegedly recruited by his acquaintance Orest Bychkovskiy to participate in the aforementioned organization (SAZhO, f. R-5013, d. 2, c. 1833, pp. 1–2).

The priest Davydiuk Omelian Ivanovych (born 1877) was also sentenced to the highest measure of punishment under the same article in 1938 (SAZhO, f. R-5013, d. 2, c. 1833, p. 10).

Crucial, in our opinion, is the analysis of the interrogation protocol of witness Boiko Silvestr Pylypovych dated December 7, 1957, a priest who served in the Zhytomyr Cathedral. He had worked with many of the repressed Zhytomyr priests in the second half of the 1930s, gave them a positive characterization, did not notice any counter-revolutionary activity on their part, and was unaware of any counter-revolutionary monarchist organization to which these individuals allegedly belonged (SAZhO, f. R-5013, d. 2, c. 1833, pp. 15–19). We note that this testimony was given during the period of de-Stalinization, when the person could feel freer during the interrogation, and thus spoke the truth.

Liudmyla Kopiichenko and Yevhen Timiriaiev cite numerous figures and facts about the repressions in Zhytomyr region during the ‘Great Terror’. They suggest that the Stalinist totalitarian system fabricated the necessary cases in accordance with the limits specified by the authorities, through moral and physical pressure on the arrested, falsifying interrogation protocols and other documents (Kopiichenko, & Timiriaiev, 2013, p. 249).

Another tragic figure among the repressed priests is Sokhatskyi Oleksandr Markovych (born 1891), a native of Denyski village, Zhytomyr district, Zhytomyr region. On the day of his arrest on April 1, 1938, he resided in Berdychiv, Zhytomyr region, working as a labourer at

the Berdychiv sugar factory. His family included: a wife Sokhatska Mariia Mykolaivna (born 1898); a son Sokhatskyi Serhii Oleksandrovych (13 years old); a daughter Sokhatska Vira Oleksandrivna (9 years old); a son Sokhatskyi Vasyl Oleksandrovych (5 years old). On April 17, 1938, by decision of the Troika under Zhytomyr Oblast UNKVS (protocol No. 47), Sokhatskyi Oleksandr Markovych was sentenced to execution by firing squad for active participation in an anti-Soviet organization and for grouping anti-Soviet church elements for an armed uprising against the Soviet regime. The sentence was carried out on April 22, 1938. The burial place was not specified. On September 12, 1958, he was rehabilitated by the Military Tribunal of the Carpathian Military District (SAZhO, f. R-5013, d. 2, c. 1833, p. 363).

A researcher Viacheslav Litynskyi notes that in 1937 – 1938, in particular, in the Zhytomyr department of the NKVD, from 100 to 300 people could be shot in one night. The executioners often made false promises to the victims before carrying out the sentence (Litynskyi, 2024, p. 33).

The review of the 1938 cases of 56 repressed priests in Zhytomyr region by the MVD bodies in Zhytomyr region in the second half of the 1950s confirms that they were unjustly convicted, and that no counter-revolutionary monarchist revolution existed in Zhytomyr city in the 1930s. These were shocking, belated conclusions by the relevant authorities, who were approached by the relatives of the illegally repressed priests whose lives were shattered by the Stalinist punitive repressive machine.

Studying the testimonies of the priests, one can conclude that they denied any anti-Soviet agitation. The interrogation protocols themselves appear highly suspicious due to their uniform questions from investigators and the stereotypical answers from the arrested.

It should be noted that 1938 was a tragic year for thousands of people of various nationalities living in Zhytomyr region. According to some researchers, from September 25–27, 1938, a total of about a thousand people of German, Polish, and other nationalities from various districts of the region were convicted, sent to prisons, deported, and shot (Slobodeniuk, 2023).

The communist regime's anti-religious campaigns were also reflected in periodicals. We particularly noted the local press. For instance, in 1937, the pages of the newspaper "Radianska Volyn" featured numerous publications on this subject. In the issue of July 6, 1937, in an article titled "Relentlessly Expose the Counter-Revolutionary Actions of the Priesthood," the priest and members of the church community in Veresy village, Zhytomyr district, were accused of allegedly subversive activities concerning the harvest collection on the collective farm. "Under the guise of religion, church officials travel to Zhytomyr, Kyiv, informing 'holy fathers' about their work and receiving instructions on how to conduct vile anti-Soviet agitation," the article stated.

In the neighbouring villages of Vatskiv and Hadzintsi, believers were also accused of such subversive work and hostile agitation in the village. The article mentioned that the village leadership was conducting no political-mass work with the youth, and in Psyshchi village, the sexton and one of the believers allegedly obstructed the construction of a school planned by the collective farm (Radianska Volyn, 1937, 155 (3716), 6.07, p. 3). Generally, as we understand it, this concerned the ideological struggle with believers in the region's villages, who, through their way of life and religious views, influenced the consciousness of their fellow villagers, thereby creating problems for the Soviet authorities' actions.

One of the Old Believer priests in Zhytomyr city was accused of using the church premises to hide suspicious persons, speculating in manufactured goods and meat, and organizing drunken parties (Radianska Volyn, 1937, 190 (3752), 17.08, p. 3).

In some articles of the “Radianska Volyn” newspaper in 1937, priests were ascribed espionage actions against the Soviet regime. The content of the articles was aggressively directed against religion and other countries, discrediting it in people’s eyes: “Never has any religion defended the interests of the working people. And in our time, church organizations in all countries, as a rule, are closely connected with fascism, with the enemies of the USSR, with the most reactionary elements of the international bourgeoisie, and assist them in all their crimes against the working people” (Radianska Volyn, 1937, 194 (3756), 22.08, p. 3).

In the lengthy article “Spies and Saboteurs in Cassocks,” it was emphasized that during the years of Soviet communist construction, just as during the Civil War, “the church agency of capitalist counterintelligence waged a rabid struggle against all measures of the communist party and the Soviet government, fought against the transformation of a backward country into a mighty, strong socialist homeland.” The author quoted Stalin, who believed that anti-religious propaganda should undermine the influence of the “reactionary clergy” (Radianska Volyn, 1937, 222 (3784), 24.09, pp. 3–4).

By labelling the clergy and accusing them of counter-revolutionary activity, the authors of some publications called for an even greater expansion of the work of militant atheists (Radianska Volyn, 1937, 102 (3663), 04.05, p. 3).

Analyzing the content of many newspaper articles, we realize how the anti-religious propaganda on the pages of hundreds of newspapers destroyed traditional religious values and the inner world of man, instilling doubt and hostility against one’s own church, thereby paving the way in the souls of many non-believers to approve the totalitarian authorities’ repressions against the clergy, torture, and executions.

At the same time, it must be noted that the Soviet regime closely monitored the implementation of anti-religious propaganda in every village and city. For instance, in Levkovo village, Zhytomyr district, the anti-religious circle organized by the authorities ceased to function due to the departure of its leader. However, anti-religious lectures by district representatives were conducted for collective farmers and all village residents, poisoning the consciousness of those present with their arguments. The article called on the party and Komsomol organizations of the village to carry out this work (Radianska Volyn, 1937, 223 (3785), 26.09, p. 3).

From the content of some articles in the same newspaper, one can conclude that not all collective farm chairmen saw counter-revolutionary actions in the existence of churches and the lives of believers in their villages. For example, the author of the article “How Long Will Priestly Henchmen Rule in the Kalynivka Collective Farm?” expressed surprise why a collective farm chairman I. Kozel, instead of cleansing it of “hostile people, of counter-revolutionary priestly rabble,” took no measures to do so (Radianska Volyn, 1937, 226 (3788), 29.09, p. 3). In Berezivka village, Zhytomyr district, for example, the village and collective farm leaders were consequently accused of political blindness and the lack of anti-religious propaganda (Radianska Volyn, 1937, 84 (3645), 10.04, p. 3).

In the article “To Conduct Anti-Religious Propaganda Systematically,” the author wrote that the 1936 Stalin Constitution of the USSR granted all citizens freedom of religious worship and freedom of anti-religious propaganda, while omitting the fact that the latter freedom, unlike the former, was indeed supported and practiced by the authorities. An example is given of a synagogue operating in a private building next to the agitation and propaganda department of the district party committee in Radomyshl city. “And what is counterposed to this?” the author asks. “What anti-religious work is conducted among Jewish

workers in Radomyshl? None”. It was proposed to systematically educate the workers in an anti-religious spirit, involving teachers and other cultural forces of the city (*Radianska Volyn*, 1937, 120 (3681), 26.05, p. 1).

The Zhytomyr Regional Lecture Bureau systematically organized lectures on anti-religious themes at enterprises and collective farms in the districts. Specifically, one issue of the “*Chervone Polissia*” newspaper reported on a lecture held on September 24, 1938, on the topic: “Marxism-Leninism on the Origin of Religion” at the ‘Bolshevik’ artel in Korostyshiv (*Chervone Polissia*, 1938, 224 (4088), 28.09, p. 4).

The formally proclaimed freedom of conscience and religion in the USSR did not protect believers in real life. The separation of church and state, as Tetiana Havryliuk notes, led to the dominance of the right of the atheistic worldview, and the religious worldview was subjected to devastating criticism (Havryliuk, 2022, p. 94).

Overall, the Bolshevik regime in the 1930s failed to achieve rapid changes in the religious consciousness of citizens. Oleh Bazhan notes that Soviet special services reported an increase in the population’s religious activity during and after the all-Union census conducted in January 1937. In total, 56.7% of citizens across the USSR identified themselves as believers (Bazhan, 2020, p. 301). The persistence of the population’s religiosity, according to Alla Kyrydon, testified to the complexity and a contradictory nature of the process of society’s transition to a new paradigm of existence, as well as the defense of “traditional socio-cultural relations against communist ideology” (Kyrydon, 2011, p. 196). Some researchers of the population’s religiosity issue in the Ukrainian SSR highlight the significant influence of family upbringing on the preservation of religious faith, the complex process of choosing a worldview under ideological pressure from the authorities (Havryliuk, & Diatlov, 2023, p. 58).

Thus, the policy of repression against religion and the Orthodox clergy in Zhytomyr region in the 1930s was an integral component of the communist regime’s all-Union totalitarian policy. Anti-religious propaganda became systematic, directed against the church as a social institution, and against the religious beliefs of the population in favour of communist ideology.

Conclusions. The repressive policy against the Orthodox clergy in Zhytomyr region was closely linked to the system of all-Union measures to combat real and imagined adversaries of the Stalinist regime. Furthermore, as evident from archival case materials and local periodicals, the Soviet regime viewed the church and the sermons of priests as an ideological competitor in the struggle for influence over the population’s consciousness, aiming to indoctrinate them with communist totalitarian concepts and principles.

The archival criminal cases are of crucial importance in clarifying the reasons for the terror against the clergy in Zhytomyr region in 1937 – 1938, who were incriminated for anti-Soviet activity, including the clergy’s participation in monarchist, nationalist, espionage, and insurgent organizations fabricated by the NKVD officers for the purpose of “overthrowing the Soviet regime” and proclaiming independent Ukraine.

The content of the archival investigative cases and issues of the newspapers “*Radianska Volyn*” and “*Chervone Polissia*” is striking in its biased, a hostile attitude toward the arrested priests, and the incitement of negative feelings toward the Orthodox clergy in society. Anti-religious propaganda became systematic, aimed against the church as a social institution, introducing doubt into the population’s minds about the correctness of religious beliefs, convincing them of its own arguments in favour of the ruling Bolshevik party, inflicting severe damage on the human relationship with God, by denying and distorting the church’s activities. At the same time, anti-religious propaganda was not carried out in all villages of

Zhytomyr region as the authorities desired, which indicated the deep rooting of religion in the everyday lives of the peasants. The insults directed at priests by the authors of the articles, the ascription of illegal actions to them, espionage activity against the Soviet regime, and the distortion of religious concepts were intended to discredit religion and the priesthood in the eyes of the population and to persuade them of the necessity of supporting the Bolshevik regime and communist ideology. The destruction of the population's traditional religious consciousness and the inner world of a man harmed both the church and society as a whole.

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Olexandr SHAMRAI

PhD (History), Associate Professor, Associate Professor of the Department of History and Law, Cherkasy State Technological University, 460 Shevchenko Blvd., Cherkasy, Ukraine, postal code 18000 (shamraiog@gmail.com)

ORCID: 0000-0003-2515-0673

Ruslan LEVINETS

PhD (History), Associated Professor at Department of Contemporary History of Ukraine, Taras Shevchenko National University of Kyiv, 60 Volodymyrska Street, Kyiv, Ukraine, postal code 01033 (3dnya@ukr.net)

ORCID: 0009-0003-1115-8284

Олександр ШАМРАЙ

кандидат історичних наук, доцент, доцент кафедри історії та права, Черкаський державний технологічний університет, бул. Шевченка, 460, м. Черкаси, Україна, індекс 18000 (shamraiog@gmail.com)

Руслан ЛЕВІНЕЦЬ

кандидат історичних наук, доцент кафедри новітньої історії України Київського національного університету імені Тараса Шевченка, вул. Володимирська, 60, м. Київ, Україна, індекс 01033 (3dnya@ukr.net)

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**RURAL CINEMA NETWORK OF CENTRAL UKRAINIAN REGIONS
IN THE POST-WAR PERIOD (1943 – 1953) AND THE USE OF CINEMA
AS A MEANS OF IDEOLOGICAL INFLUENCE**

Abstract. The article focuses on the analysis of the state and functioning of the rural cinema network in the regions of Central Ukraine during the post-war period (1943 – 1953). Cinema is considered an important cognitive and educational tool and a form of leisure for the rural population. It turns out that due to its imagery, the combination of motion effects with sound, cinema, even with the straightforwardness and platitudes characteristic of most films of that time in revealing the theme, made it possible to emotionally perceive the screen action and made it understandable and accessible to everyone. The purpose of the article is a comprehensive analysis of the state, the restoration features and functioning of the cinema network of Central Ukraine during the post-war period (1943 – 1953), as well as to clarify the role of cinema as a tool of ideological influence and the official historical memory formation under the conditions of the Soviet cultural policy. The methodological basis of the study is the principles of historicism, objectivity and systematicity. In the study there has been used a complex of general scientific and special historical methods, in particular: historical genetic – to trace the process of restoring the cinema network; historical systemic – to analyze its

organizational structure; problem-chronological – to highlight the dynamics of development; source analysis of archival documents and statistical materials. The methodological approach is also based on modern concepts of the history of everyday life, cultural policy and the study of historical memory. The scientific novelty of the study consists in the fact that: for the first time, the rural cinema network functioning of Central Ukraine during the post-war period has been comprehensively analyzed; new archival materials on the organization of cinema services for the population have been introduced into scientific circulation; the mechanisms of party-state control over the formation of the film repertoire have been revealed; the role of cinema as an effective tool for ideological mobilization and the construction of official historical memory under the conditions of post-war Soviet society has been proven. Conclusions. It has been determined that the restoration of the rural cinema network of Central Ukraine during the post-war period took place under the conditions of significant material and technical difficulties, personnel shortages and weak infrastructure. Despite this, the state gave priority to the development of film services as an important tool of ideological influence on the population.

The formation of the film repertoire was under strict party and state control and was aimed at popularizing official historical narratives, glorifying Soviet reality and forming loyalty to the authorities.

Documentary and feature films served as a means of political socialization, contributing to the spread of standardized models of historical memory and ideological attitudes among the rural population.

Key words: cinema network, post-war period, Central Ukraine, ideological influence, historical memory, Soviet propaganda, film repertoire.

СІЛЬСЬКА КІНОМЕРЕЖА ЦЕНТРАЛЬНОУКРАЇНСЬКИХ ОБЛАСТЕЙ У ПОВОЄННИЙ ПЕРІОД (1943 – 1953) ТА ВИКОРИСТАННЯ КІНО ЯК ЗАСОБУ ІДЕОЛОГІЧНОГО ВПЛИВУ

Анотація. У статті досліджується стан і функціонування кіномережі в областях Центральної України у повоєнний період (1943 – 1953). Проаналізовано процеси її відновлення, матеріально-технічне забезпечення, кадрову політику та організаційні особливості кінообслуговування населення. Особливу увагу присвячено механізмам партійно-державного контролю над формуванням кінорепертуару. **Метою статті** є комплексний аналіз стану та функціонування сільської кіномережі у повоєнний період (1943 – 1953), а також з'ясування ролі кіно як інструмента ідеологічного впливу та формування офіційної історичної пам'яті в умовах радянської культурної політики. **Методологічну основу** дослідження становлять принципи історизму, об'єктивності та системності. У роботі використано комплекс загальнонаукових і спеціально-історичних методів, зокрема: історико-генетичний – для простеження процесу відновлення кіномережі; історико-системний – для аналізу її організаційної структури; проблемно-хронологічний – для висвітлення динаміки розвитку; джерелознавчий аналіз архівних документів і статистичних матеріалів. **Методологія** дослідження також спирається на сучасні концепції історії повсякденності, культурної політики та дослідження історичної пам'яті. **Наукова новизна** дослідження полягає у тому, що: уперше комплексно проаналізовано функціонування сільської кіномережі Центральної України у повоєнний період; введено до наукового обігу нові архівні матеріали щодо організації кінообслуговування населення; розкрито механізми партійно-державного контролю над формуванням кінорепертуару; доведено роль кіно як ефективного інструмента ідеологічної мобілізації та конструювання офіційної історичної пам'яті в умовах післявоєнного радянського суспільства.

Висновки. Установлено, що відновлення сільської кіномережі Центральної України у повоєнний період відбувалося в умовах значних матеріально-технічних труднощів, кадрового дефіциту та слабкої інфраструктури. Держава надавала пріоритет розвитку кінообслуговування як важливого інструмента ідеологічного впливу на населення.

Формування кінорепертуару перебувало під жорстким партійно-державним контролем і спрямовувалося на нав'язування офіційних історичних наративів, героїзацію радянської дійсності та формування лояльності до влади. Документальне та художнє кіно виконувало функцію засобу політичної соціалізації, що сприяло поширенню стандартизованих моделей історичної пам'яті й ідеологічних установок серед сільського населення.

Ключові слова: кіномережа, повоєнний період, Центральна Україна, ідеологічний вплив, історична пам'ять, радянська пропаганда, кінорепертуар.

Problem Statement, Review of Recent Research and Publications. The topic of cultural and educational processes in the Ukrainian village during the period of post-war reconstruction, and in particular the place and role of cinema in them, remained out of researchers' focus for a long time, and if it was covered, it was only tangentially and from the perspective of communist ideology. Only in the era of Ukraine's independence there were conditions created for a comprehensive study and objective understanding of this sphere of the spiritual life of the Ukrainian peasantry.

It was found that the topic of filmization in researchers' studies is present only tangentially and, as a rule, in the context of studying other aspects of the history of the Ukrainian post-war village. In particular, B. Romanyuk in his research, showing the role of cinema in the socio-cultural life of the collective farm peasantry, focused on the material and technical base of the rural cinema network (Romanyuk, 2019, pp. 211–219). Through the prism of peasants' everyday life, who lived in the central regions of Ukraine, T. Nagaiko studied the film service in 1941 – 1945 (Nagaiko, 2009, pp. 5–12). The topic of the rural cinema network functioning in the post-war period was briefly analyzed by T. Tereshchenko (Tereshchenko, 2004, pp. 354–362), S. Kalibovets (Kalibovets, 2010, pp. 6–13), V. Michuda (Michuda, 2004, p. 355), N. Kovalenko (Kovalenko, 2017, pp. 8–18) and the others. Some methodological aspects regarding the cultural and everyday aspects of Ukrainian village life are revealed in the works of V. Ilnytskyi and M. Haliv (Ilnytskyi, & Haliv, 2019; Ilnytskyi, & Haliv, 2020; Haliv, & Ilnytskyi, 2023).

Analysis of recent studies on the issue gives grounds to assert that, despite the availability of thematically diverse publications, the topic of rural cinema and its use as a means of ideological influence in the post-war period has been developed rather superficially and fragmentarily. They only outline possible directions for researching the problem and highlight only its individual aspects, which does not provide a holistic and objective vision of cultural and educational processes in the Ukrainian post-war village.

The purpose of the study is a comprehensive analysis of the state, the restoration features and functioning of the cinema network of Central Ukraine during the post-war period (1943 – 1953), as well as to clarify the role of cinema as a tool of ideological influence and the official historical memory formation under the conditions of the Soviet cultural policy.

Research Results. In the system of cultural and educational work in the villages of Central Ukraine in the post-war period (1943 – 1953), cinema occupied an important place as a cognitive and educational tool and a form of leisure for the population. Due to its imagery, combination of motion effect with sound, cinema, even with the straightforwardness and platitude characteristic of most films of that time in revealing the theme, provided the opportunity for emotional perception of the screen action and made it understandable and accessible to every person. For the inhabitants of the village, where there was not such a variety of types of leisure as in the city, cinema had a special meaning.

Cinema was considered an effective means of agitation and propaganda informing the rural population in the spirit of the then dominant ideology and a tool of political agitation and the prompt dissemination of the communist party information. Therefore, the restoration and expansion of the pre-war rural cinema network began immediately after the liberation of settlements from the Nazis.

The starting document in organizing this work was the resolution of the Council of People's Commissars of the Ukrainian SSR of March 14, 1944 "On Measures to Improve Film Services for the Population of the Ukrainian SSR" (Postanova, 1961, p. 21). The

resolution reflected the specifics of the cultural policy of the Soviet government at the stage of liberating the territory of Ukraine from the Nazi occupation and was part of a large-scale campaign to restore ideological influence through cinema, a powerful tool of propaganda.

The main goal was the forced restoration of the cinema network. Since there were not enough stationary premises and halls, the emphasis was placed on mobile cinema installations that could serve villages and military units. The organization of courses for the training of projectionists was to alleviate the problem of personnel, which was catastrophically lacking. The film repertoire was oriented towards films with a high patriotic and mobilization content.

When developing the village cinema network, the party-Soviet authorities assumed that cinema was the fastest way to convey to people the official version of events on the fronts of the still ongoing war and to tune them in to the “correct” political slogans. And the resumption of screenings in villages was to be psychologically perceived by the population as a sign of a return to peaceful life and as a demonstration of the superiority of the Soviet system over the occupation system.

In order to implement the government resolution, numerous decisions were made at the regional and district levels. Thus, in May 1944, the issue of film services for the population was considered by the Poltava Regional Executive Committee. Among the approved measures to improve the work of the rural cinema network of the region, which at that time consisted of 14 stationary and 27 mobile (of which 12 were “silent”) cinemas, the disintegration of the existing inter-district film departments and the organization of such departments in each district was of great importance.

In order to stimulate and consolidate the staff of rural projectionists, it was also planned to include them in the supply according to the norms of the second category determined for industrial workers (SAPR, f. 4085, d. 3, c. 2, pp. 5–7; c. 3, pp. 85–97). Such measures were taken in other regions as well.

However, in practice, progress in providing cinema services to the rural population was slow. Therefore, on October 11, 1944, the RNK of the Ukrainian SSR and the Central Committee of the CP (b) U adopted another, more specific resolution “On Improving the Work of Rural Cinemas” (Postanova, 1961, pp. 67–69).

At the beginning of the reconstruction period, the rural cinema network was in a depressing state. In 1944, in 64% of Ukrainian villages, films were not shown at all or villagers watched them no more than 1–2 times (Рибак, 1997, с. 89). In the villages of Poltava region, there were only 47 stationary and 15 mobile cinemas, of which 5 were wide-screen, 1 was narrow-screen and 9 were “silent”. In Dnipropetrovsk and Kirovohrad regions, there were 12 mobile cinemas, and in Kyiv – 7 (Postanova, 1961, p. 229).

In the following years, despite all the shortcomings and difficulties of a material and financial nature, certain changes took place in the rural cinema network. If at the beginning of 1945 there were only 158 cinemas operating in the villages of the Central Ukrainian regions, then at the beginning of 1950 their number increased 6 times and amounted to 974 (in Dnipropetrovsk – 317, Kyiv – 241, Kirovohrad – 188, Poltava – 228) (Narodne hospodarstvo, 1957, p. 364).

However, despite the positive dynamics of the increase in the total number of cinemas in rural areas, by the end of 1953 the rate of cinematography in villages still remained too low. There were 5,697 cinemas operating in villages, of which 2,769 were mobile horse-drawn and 860 were drive-in cinemas, which was an average of one for every 3–4 villages. There were still over 1,500 villages in Ukraine where there were no clubs suitable for showing films

at all (CSAPAU, f. 5116, p. 1, c. 12, pp. 183–185). At the same time, only 12.1% of rural and collective farm clubs were equipped with stationary cinema installations (Tereshchenko, 2004, pp. 354–362). In Dnipropetrovsk region, even at the beginning of 1950, there were only 155 of them. Other villages were served by 98 cinema trailers, of which 91 (93%) were horse-drawn (Dovidka, 1989, p. 503).

Existing village cinemas were often idle due to organizational problems, lack of fuel, generators, and other reasons. Violations of the schedules for the delivery and screening of films became systemic. New films arrived in the village with great delay, sometimes they were in such a condition that it was difficult to watch them. And in the villages that were part of Yuriev village council of Tsarychansky district of Dnipropetrovsk region, the peasants in 1947 did not see films at all for almost six months (Shyriaiev, 1948, p. 4).

The quality of the film screenings was also very low. A typical story for that time was described in a regional newspaper in January 1946 by a moviegoer M. Kovalenko from the village of Velyka Bahachka, Poltava region: “The projectionists and the head of the cinematography are “telling fortunes” near the camera. This is called a “test”. After discussion, the “technical commission” gives a conclusion: “Maybe it will make it”. And the film began.

You can see something on the screen. As if in a fog, various figures emerge and suddenly disappear. A quiet rustling is heard from the screen, which suddenly turns into terrible explosions. The audience instinctively moves away from the screen. And not in vain – the screen falls from the strong sound. After that, there is an enthusiastic excitement in the hall, which turns into a “roaring ovation”. The resourceful projectionist, taking advantage of this, announces a break. After the break – another break: the film has torn ... ” (Kovalenko, 1946, p. 4).

A contributor to the Kirovohrad regional newspaper “Kirovohradska Pravda” I. Haichuk from the village of Pavlyshi, Onufriyiv district, wrote in a letter to the newspaper: “The film “The Power of Life” was supposed to be shown in the village club. Tickets were sold. People waited for several hours for the screening to begin. Only at 12 o’clock in the morning were they told that the motor was faulty and the screening of the film would be postponed until tomorrow. This is how the film was “shown” on August 14 and 16. This is where the unworthy practice has taken root – they will take money from the viewer and then announce: “The film will not be on again” (Povnistiu zadovolniaty, 1948, p. 2).

The most characteristic shortcomings in the restoration of the rural cinema network and the organization of cinema services for the rural population in the post-war years can be traced on the example of Poltava region, where in 1946 the plan for the restoration and development of the state cinema network was fulfilled by only 80.1%. In 1947, even in 22 district centres and urban-type settlements of this region, as immediately after the war, there were no stationary cinemas (SAPR, f. 4085, d. 3, c. 285, pp. 85–87).

The rate of cinema downtime was slowly decreasing and remained high. Thus, in 1948 it amounted to 4124 screen days or 13.7% of the planned number of days of operation of the regional cinema network. The main reasons for disruptions in film screenings were: breakdown of cinema equipment – 41.9%, non-delivery of films – 14.7%, absence of a projectionist – 9.6%, power outages – 8.9% (SAPR, f. 4085, d. 3, c. 635, pp. 52–57).

One of the main problems of the rural cinema network was considered to be the work of projectionists, who were responsible not only for screening films, but also for transporting cinema installations, selling tickets, and other organizational issues. At the same time, projectionists received a salary of 280–450 rubles (cleaners received 300 rubles) with 27 working days and showing 58 screenings. Low wages, poor living conditions, and

management's indifference to the problems and needs of cultural and educational work in the countryside led to a high turnover of projectionists, as well as other categories of rural cultural workers (Baytsym, 2021). In many cases, rural projectionists performed their duties on a temporary or part-time basis and were not distinguished by technical training, education, or culture of behaviour.

Typically, films were on in village clubs, but in the post-war years, many clubs were used for other purposes – mainly for storing grain and other agricultural products, while others were destroyed.

In many villages, film screenings were held in adapted premises that did not meet the basic requirements of cultural and educational work. Thus, in the village of Krutki, Irklyiv district, Poltava (nowadays Cherkasy) region, films were shown in the premises of a horse farm until 1951 by a mobile cinema installation that arrived from the district centre. It was powered by a dynamo, which was manually turned by those who wanted to watch mostly “silent” films (Kippa, 2003, p. 114). In the summer, films in rural areas were often on outdoors on white canvas screens attached to the premises, or simply on whitewashed walls.

But despite a low level of cinema service, film screenings were always an event in a village cultural life, and the number of viewers attending film screenings grew constantly. And the dynamics of the increase in the audience in rural areas was significantly higher than in cities. If the attendance of film screenings by urban viewers in Poltava region increased by 154% in 1947–1950, then the attendance rate in rural areas increased much more and amounted to 406 (SAPR, f. 4085, d. 3, c. 743, p. 92).

Under the conditions of post-war reconstruction, cinema, subordinated to the Communist Party ideology, acquired a special mobilizing and informational and agitational significance and became an important component of mass political work among rural residents. At the initial stage of the restoration of the rural cinema network, when the war was still ongoing (1943 – 1945), films were aimed at maintaining fighting spirit, forming hatred for the enemy and heroizing the Soviet soldier. The period of post-war Stalinism (1946 – 1953) in cinema was marked by a total ideological offensive in the humanitarian sphere (“zhdanovshchyna”) and the glorification of J. Stalin as a victorious leader.

Compliance with ideological criteria for the content of films was ensured by strict censorship by the security agencies, the Main Film Committee, the State Film Commission and party bodies even at the stage of creating film production and its release on the screen. In the fields, party policies were implemented through a repertoire policy regarding the selection of films for the mass audience. The film repertoire for the rural cinema network was formed by district film departments under the control of district party committees, and directly in the villages it was coordinated with party organizations.

The repertoire plans of rural cinemas included traditional “ideologically sound” films for that time, among which military patriotic themes prevailed, which were supposed to support the moral optimism of the rural population and its willingness to live and work in difficult conditions to build a “bright future”.

An idea of the repertoire of the rural cinema network in the central Ukrainian regions is given by the example of the districts of the Kirovohrad region in 1947. Thus, in Kompaniyiv district, rural viewers were offered films “Two Fighters”, “Cruiser “Varyag””, in Ustymivskiy – “Sons”, “Admiral Nakhimov”, “Stone Flower”, in Malovyskivske – “Alexander Parkhomenko”, “Stone Flower”, in Oleksandrivske – “Two Fighters”, “A Man with a Gun”, “Our Heart”, in Kamianske – “Shchors”, “Ivan Hrozný”, “Cinderella”. Before

the feature films, such chronicle-documentary films, marked by the influence of the then dominant ideology, were necessarily shown, such as “Our Soviet Motherland”, “Soviet Estonia”, “Court of Nations”, “Hello, Moscow”, “Bulgaria” (CSAPAU, f. 4623, d. 1, c. 39, pp. 48–53).

Despite limited information and access to artistic values, villagers viewed the screening of films with interest. Tired of constant ideological indoctrination, villagers enjoyed watching entertainment and comedy films that were free from ideological bias and closer to real life. A resident of the village of Zhuravka, former Zlatopilskyi district, Kirovohrad region, O. I. Prysiazhny, recalls that pre-war films “Funny Guys” and “Volga-Volga”, and also the rare American film “Tarzan” were particularly popular among his fellow villagers at that time (Spohady Prysiazhnoho, 2006). These same films were also called popular by a resident of the village of Drabivka, former Korsun-Shevchenkivskyi district, Kyiv (nowadays Cherkasy) region, H. M. Velychko (Spohady Velycka, 2006). Films of this genre served as a kind of psychological relief for the rural population in conditions of hard and unenlightening collective farm labor and material hardship.

Given the popularity of cinema and the high attendance of film screenings by rural residents, party organizations, as a form of ideological influence, widely practiced combining film screenings with lectures, conversations, and amateur performances. The propaganda and information role was also strengthened by chronicle-documentary film magazines, which, although rarely, began to appear on rural screens. One of them was the magazine “Soviet Ukraine”, which with pathos informed viewers about events in the republic and abroad.

The spread of newsreels, including on rural screens, was facilitated by the return of the Ukrainian Studio of Chronicle Films and the Ukrainian Film Studio of Popular Scientific and Educational Films from evacuation in the summer of 1944. The documentary film by O. Dovzhenko and Yu. Solntsev “Victory in Right-Bank Ukraine and the Expulsion of German Invaders from the Ukrainian Lands” was popular among rural viewers. The documentaries “Kyiv”, “Dniprohes”, “Nash Kharkiv”, “Na Donbas”, “Odesa” were also released on the screens, which were about the reconstruction work (Rozvytok kultury, 1967, p. 227).

Popular feature films among the rural population were incorporated into complex agitation and propaganda events, during which party propagandists conducted lectures, held discussions on labour and military patriotic topics, performed by amateur art groups, and used visual agitation. One of such forms in the central regions, as well as in other regions of Ukraine, was collective farm film festivals, which were held during the most intense periods of agricultural work.

In Kyiv region from March 15 to April 6, 1947, during the spring sowing campaign, a collective farm film festival was held in 25 district centres of the region, during which 194 film screenings were held, which were watched by 22.3 thousand viewers. As part of the film festival, lecturers and agitators from among the party and Soviet activists conducted 60 lectures. In Bila Tserkva, Cherkasy, Uman and Brovary, 4 agitation film tours were operating at that time.

However, this film festival practically did not reach the villagers directly, since it was held in district centers and provided for transportation of collective farmers from the villages of the district. Thus, in Vasylkiv district, despite the preparatory work carried out by a commission headed by the secretary of the district committee of the Communist Party of Ukraine (Bolsheviks), only 580 collective farmers from 7 collective farms adjacent to the district centre attended the several-day festival events in the district centres.

Similar events that were aimed directly at rural settlements were more popular. The collective farm film festival in Kyiv region during the harvest preparation period from June

19 to 29 was much more successful that year. The main part of its events was held in 33 villages and only 10 in district centres. 27 thousand spectators attended 175 film screenings and 50 amateur concerts dedicated to them (CSAHAGU, f. 4623, d. 1, c. 39, pp. 33–34).

In rural areas, film workers, like workers in other humanitarian institutions, were tasked not only with showing films, but also with performing other mass-political work tasks that were not their own. For example, Dnipropetrovsk district film department reported in 1946 that “the film department wrote 307 slogans, posters, quotes, and panels,” and other agitation work was carried out (CSAHAGU, f. 4623, d. 1, c. 31, p. 6).

The Soviet authorities and the ideological apparatus of the Communist Party under the conditions of reconstruction focused on the adaptation of film propaganda to target audiences. In particular, a prominent place in the repertoire of rural film distribution, along with chronicle and documentary films, was occupied by popular science and educational and technical films, the specific weight of which in the rural cinema network was higher than in cities. For example, in the first half of 1946, such films in rural areas of Poltava region accounted for 1043 screen days, while in cities – 861. Accordingly, they were watched by 226.6 thousand rural and 97 thousand urban viewers.

In addition to popular science and educational and technical films on agricultural topics, a special place was given to medical topics, since medical care and sanitary and hygienic conditions in the post-war village were at a very low level. The chief focus in the topics of sanitary and educational films was on the prevention of epidemic diseases – typhus and typhoid fever, dysentery, the measles, influenza, venereal diseases. Fire-fighting films were also on, to help the organizers of pre-conscription training, films of popular science content (CSAPAU, ф. 1, d. 23, c. 2824, pp. 44–45).

Part of the general policy of ideological influence in 1943–1953 was the Russification of the film repertoire, characterized by the displacement of national content and the introduction of Russian as the main language of cinema. By the beginning of 1953, out of about 50 thousand copies of films available in Ukraine, only 2,650 (5%) were dubbed in Ukrainian (CSAPAU, f. 1, d. 1, c. 1120, pp. 324–325). All popular science and chronicle-documentary films and newsreels “News of the Day”, “News of Agriculture” and “Science and Technology” produced outside the Ukrainian SSR were also shown in Russian (Kaganov, 2019, p. 283).

Conclusions. The conducted research gives grounds for the conclusion that cinema in the post-war period was a significant factor in organizing the free time of rural residents of central Ukrainian regions and satisfying their spiritual, artistic, educational and informational needs. With its accessibility, this type of art attracted viewers and enjoyed great popularity among them. However, the level of cinema service was low and improved very slowly, since the functioning of the rural cinema network was hampered by unsatisfactory material and technical support, personnel problems and performance discipline.

During the post-war period cinema was actively used by the party-Soviet apparatus as a means of ideological influence on the formation of the consciousness of the rural population and the mobilization of its efforts to implement the policy of the ruling party. Chief focus was on controlling the formation of the film repertoire and filling it with artistic films that showed military victories and labour enthusiasm, and the official film production included in the repertoire of rural cinemas in every possible way embellished real reality.

A common form of ideological influence was the combination of film screenings with lectures and conversations by party agitators, and amateur performances. Thematic film festivals were held, subordinated to the ideological processing of the rural population. The

propaganda and information role was also played by chronicle-documentary newsreels, which were necessarily shown before feature films, informing the rural audience with pathos about events in the republic and abroad.

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Inna LEVCHENKO

PhD hab. (History), Professor, Head of the Department of Theory and methods of professional training, Hryhory Skovoroda University in Pereiaslav, 30 V. Suhomlynskyi Street, Pereiaslav, Ukraine, postal code 08401 (inna.lewchenko2000@ukr.net)

ORCID: 0000-0001-9652-8755

Mariia DMYTRENKO

PhD hab. (Philosophy), Professor, Professor at the Department of Social and Humanitarian disciplines of National University of Civil Protection of Ukraine, 8 Onoprijenko Street, Cherkasy, Ukraine, postal code 18003 (-dmytrenko-@ukr.net)

ORCID: 0000-0002-8338-4032

Researcher ID: AAG-4180-2020

Scopus–Author ID : 57220049813

Інна ЛЕВЧЕНКО

докторка історичних наук, професорка, завідувачка кафедри теорії та методики професійної підготовки, Університет Григорія Сковороди в Переяславі, вул. Сухомлинського, 30, м. Переяслав, Україна, індекс 08401 (inna.lewchenko2000@ukr.net)

Марія ДМИТРЕНКО

докторка філософських наук, професорка, професорка кафедри соціальних і гуманітарних дисциплін, Національний університет цивільного захисту України, вул. Онопрієнка, 8, м. Черкаси, Україна, індекс 18003 (-dmytrenko-@ukr.net)

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EVOLUTION OF THE SOCIAL INFRASTRUCTURE OF THE UKRAINIAN VILLAGE IN THE PERIOD OF THE MID-1950s – EARLY 1960s: SUCCESS AND CHALLENGES OF MODERNIZATION

Abstract. *The purpose of the study is to conduct a holistic analysis of the evolution of the social infrastructure of the Ukrainian village in 1953 – 1964 and to identify deep contradictions between the state modernization plans of the thaw era and the real quality of life of the peasantry. The scientific novelty consists in the change in the paradigm of the study: the authors move away from a purely quantitative statistical description of infrastructure facilities in favour of analysing their qualitative functionality and accessibility. The article integrates the latest research of 2022 – 2024 to create a multifaceted vision of rural life. It has been proven that the systemic transformation of the village was half-hearted, and the foundation laid during this period had both progressive and destructive consequences for the further historical fate of the agrarian regions. The research methodology is based on the principles of objectivity and historicism. A complex of general scientific and special historical*

methods has been applied. The historical-system method enabled us to consider the infrastructure as a holistic organism that combines technical (electrification), trade and socio-cultural components. The method of critical analysis of sources became the basis for the deconstruction of the ideological layers of the Soviet historiography, and micro historical and anthropological approaches made it possible to assess the impact of reforms on the everyday practices of a particular person.

Conclusions. The study confirms that the Khrushchev thaw provided a powerful impetus for the Ukrainian village to emerge from the infrastructural decline of the Stalin era. However, this process was inconsistent and half-hearted: the complete levelling of differences between the city and the village never occurred. It has been determined that although rural residents felt, for the first time, as full-fledged subjects of the system of consumer services, trade and healthcare, the quality of service often remained at a critically low level. This gives grounds to characterize the modernization of that time as extensive, since the quantitative expansion of the network of institutions (electricity networks, hospitals, and agricultural markets) significantly outpaced their qualitative content and actual accessibility for the broad masses of the population. The authors state that understanding the errors of the then “residual principle” of financing and excessive centralization is necessary for the development of effective strategies for the revival of modern Ukrainian villages under the conditions of decentralization.

Key words: social infrastructure, Ukrainian village, the thaw era, modernization, social policy, electrification.

ЕВОЛЮЦІЯ СОЦІАЛЬНОЇ ІНФРАСТРУКТУРИ УКРАЇНСЬКОГО СЕЛА В ПЕРІОД СЕРЕДИНИ 1950-х – ПОЧАТКУ 1960-х рр.: УСПІХИ ТА ВИКЛИКИ МОДЕРНІЗАЦІЇ

Анотація. Мета дослідження полягає у проведенні цілісного аналізу еволюції соціальної інфраструктури українського села в період 1953–1964 рр. та виявленні глибинних суперечностей між державними модернізаційними планами доби “відлиги” та реальною якістю життя селянства. Наукова новизна полягає у зміні парадигми дослідження: автори відходять від суто кількісного статистичного опису інфраструктурних об’єктів на користь аналізу їхньої якісної функціональності та доступності. У статті інтегровано новітні розвідки 2022–2024 рр. для створення багатогранної візії сільського побуту. Доведено, що системна трансформація села була половинчастою, а закладений у цей період фундамент мав як прогресивні, так і деструктивні наслідки для подальшої історичної долі аграрних регіонів. Методика дослідження ґрунтується на засадах об’єктивності й історизму. Застосовано комплекс загальнонаукових та спеціально-історичних методів. Історико-системний метод уможливив розглянути інфраструктуру як цілісний організм, що поєднує технічні (електрифікація), торговельні та соціокультурні компоненти. Метод критичного аналізу джерел став основою для деконструкції ідеологічних нашарувань радянської історіографії, а мікроісторичний та антропологічний підходи дали змогу оцінити вплив реформ на повсякденні практики конкретної людини.

Висновки. Дослідження підтверджує, що хрущовська “відлига” надала потужного імпульсу для виходу українського села з інфраструктурного занепаду сталінської доби. Однак цей процес мав непослідовний та половинчастий характер: повного нівелювання розбіжностей між містом і селом так і не відбулося. Встановлено, що хоча сільські жителі чи не вперше відчували себе повноправними суб’єктами системи побутового обслуговування, торгівлі та охорони здоров’я, якість сервісу часто залишалася на критично низькому рівні. Це дає підстави характеризувати тогочасну модернізацію як екстенсивну, оскільки кількісне розширення мережі установ (електромереж, лікарень, сільмагів) значно випереджало їхнє якісне наповнення та фактичну доступність для широких верств населення. Автори констатують, що розуміння помилок тогочасного “залишкового принципу” фінансування і надмірної централізації є необхідним для розробки ефективних стратегій відродження сучасного українського села в умовах децентралізації.

Ключові слова: соціальна інфраструктура, українське село, доба “відлиги”, модернізація, соціальна політика, електрифікація.

Problem Statement. The mid-1950s – early 1960s, a period in the history of Ukraine, better known as the Khrushchev thaw, was marked by turning points in the life of the Ukrainian village. It was characterized by a radical reorientation of the state course: a gradual departure from the repressive Stalinist model of management in favour of a strategy of social pragmatism, the positive side of which was the gradual increase in the well-being of the rural population. It was at this time that the material and household foundation of the infrastructure of the Ukrainian village was laid, a significant part of which (electricity networks, capital hospital buildings, educational institutions, etc.) continues to function in the modern space of Ukraine. Analysing the processes of modernization in the Ukrainian village through the prism of the latest historical paradigm it becomes obvious that the systemic transformation of the rural environment in the Ukrainian SSR in 1953 – 1964 requires a holistic rethinking. The main scientific problem lies in the internal contradictions and half-heartedness of the modernization processes. On the one hand, the dismantling of the most odious foundations of Stalin's command management allowed for large-scale electrification, the development of a network of health care facilities, public catering and consumer services. On the other hand, the ambitious goal of bridging the gap between the city and the countryside was accompanied by a number of strategic miscalculations.

In particular, excessive centralization of resources, chronic underfunding of remote areas led to the fact that infrastructure development was often extensive, purely quantitative in nature. As a result, despite the emergence of new capital structures, the real quality of service provision (medical, commercial, transport) remained at a low level.

Thus, the issue of the real effectiveness of the modernization of rural space under the conditions of the Soviet totalitarian system and the influence of the infrastructure foundation laid during this period on the further historical fate of the Ukrainian village requires scientific clarification. In addition, under the conditions of modern transformations, in particular the decentralization reform, and the search for new models of development of agrarian regions, the study of the historical causes of the infrastructure gap between the city and the village acquires special importance. Understanding the systemic errors of the past such as excessive centralization, ignoring logistical features and the residual principle of financing the social sphere is necessary for the development of effective strategies for the revival of the modern Ukrainian village and the creation of a high-quality service environment in it.

Review of Recent Research and Publications. Modern scientific research (2022 – 2024) offers new methodological approaches to the topic. In particular, O. Sydorovych and V. Lytovchenko (Sydorovych, & Lytovchenko, 2024) examined in detail the structural transformations in the system of consumer cooperation highlighting its role in attempts to establish household services. V. Korol (Korol, 2023) significantly expanded the understanding of the technical aspect of modernization, analysing the impact of electrification on the transformation of domestic space and daily practices of the peasantry. In turn, O. Melnychuk and A. Polishchuk (Melnychuk, & Polishchuk, 2022) revealed the local specificity of socio-cultural changes using the example of a separate settlement in Podillia using an anthropological approach.

Thus, we can conclude that the historiographical basis of our scientific article is quite powerful; however, given the dynamic nature of modern socio-cultural transformations, it requires further clarification and rethinking. Despite the presence of thorough works, most of which are focused on studying the infrastructure of the Ukrainian village as a set of quantitative indicators, leaving out of consideration the qualitative aspect: the reliability of

these systems, the availability of services for the population, etc. That is why, our research is aimed at analysing infrastructure not as a static network of buildings, but as a living mechanism that was supposed to ensure the success of modernization, but instead failed to fully satisfy the needs of the population, becoming one of the greatest challenges for the Soviet social policy.

Purpose of the study. The purpose of the article is to conduct a holistic analysis of the evolution of the infrastructure of the Ukrainian villages in 1953 – 1964 and to identify contradictions between state plans and the real quality of life of peasants.

Research Results. The Khrushchev's thaw brought positive changes to the lives of the Ukrainian peasants. The processes of liberalization and de-Stalinization undoubtedly became a catalyst for the modernization of rural areas, which during the previous Stalinist period had suffered the merciless consequences of the genocidal policy of the Soviet leader. Thus, M. Khrushchev's focus on rural problems resulted in a strategy of comprehensive infrastructure development aimed at the systematic modernization of the Ukrainian villages in order to eliminate socio-economic and household disparities between the city and the countryside ultimately. Starting from the mid-1950s, significantly more funds began to flow into rural areas (purchase prices for agricultural products were increased, and taxes on household farms were reduced), which allowed the processes of electrification and gasification to become systemic. If in previous decades electricity was used mainly for the production needs of collective farms, then during the thaw period the emphasis shifted to household lighting of private homes and radio communication. Work on the arrangement of unified water supply and sewage systems also intensified, and in parallel the reconstruction of communication routes was also underway. It is worth noting that until 1954 the state allocated very limited funds for these needs of the peasants, which in the conditions of post-war reconstruction (lack of turbines, generators, and weak distribution system) did not allow intensifying work on these areas.

Only after in 1954 collective farms were allowed to connect to the state power grid, did the electrification of rural areas accelerate significantly. In particular, in 1953 the capacity of all rural electrical installations in the Ukrainian SSR was only about 350-400 thousand kW. Owing to the centralization of energy supply, by 1964 it was possible to connect more than 90% of state farms and about 80% of collective farms of the republic to the state network (Central Statistical Office under the Council of Ministers of the Ukrainian SSR, 1965, pp. 182–185). During the first year of the reform alone, electricity became available to 3,488 collective farms of Ukraine. Of these, in 584 farms, electricity was used exclusively for production purposes, and in 2,698 partly for household needs (Panchenko, & Shmarchuk, 2000, p. 249). This made it possible to electrify a significant number of peasant households (although at the initial stage, access to the network was mainly provided to representatives of the local and collective farm administrations and specialists). In the future, the dynamics only increased: for example, in Vinnytsia region alone, 73 villages were fully electrified in 1956 alone (SAVR, f. r.-2700, d. 6, c. 1443, p. 32). An important stage in overcoming the technological isolation of villages was the Resolution of the Central Committee of the CPSU and the Council of Ministers of the USSR of February 21, 1961, which approved the Five-Year Program for the Completion of Rural Electrification (Korol, 2023, p. 20). According to this document, a transition from the operation of low-power local power plants to the systematic integration of rural networks into a single state energy system was envisaged. This decision in the medium term not only ensured the stability of energy supply, but also

created the necessary technical conditions for the systematic mechanization of rural life and the deployment of a network of socio-cultural facilities.

The beginning of the 1960s was marked by the active introduction of telephone facilities into rural areas. The primary goal of these measures was pragmatic in nature, i.e. improving operational communication between central and regional administrative institutions with district centres and village councils. At the same time, during this period, the practice of installing landline telephones in private homes of peasants began. However, access to this service was limited and had a distinctly status character: subscribers were mainly representatives of the local nomenclature and rural intelligentsia (doctors, teachers, agronomists). According to the Radio and Telegraph Agency of Ukraine, as of 1964, about 400 automatic telephone exchanges were operating in the republic, providing multilateral communication in rural areas (CSAAMU, f. 5111, d. 1, c. 378 p. 31). The development of the PBX network was an important step in overcoming the information isolation of the village, although the technical capabilities of the systems at that time did not yet allow for the connection of every ordinary resident.

In the mid-1950s – early 1960s another important vector of the evolution of the infrastructure of the Ukrainian village was the development and reconstruction of the road network. In 1957 – 1959, the practice of forming inter-collective farm road-building organizations became common, which accelerated the solution to the problem of building connecting roads. Although these processes progressed slowly on the scale of the Ukrainian SSR, in the late 1950s large rural settlements finally received regular connections with district and regional centres. The functioning of bus services was also a positive moment: the first regular bus services appeared (often these were trucks converted for passenger transport). However, the general condition of the road infrastructure remained unsatisfactory: as of 1964, only 27% of public roads had a hard surface. The vast majority of villages were deprived of asphalted entrances, which under the conditions of autumn-spring roadlessness and adverse weather conditions practically paralyzed transport connections. This situation not only complicated the logistics of agricultural products, but also preserved the socio-cultural isolation of the peasantry, limiting access to medical, educational and trade services in cities.

The logical continuation of technical modernization and improved transport accessibility was the deployment of a network of consumer service facilities. It is worth noting that the infrastructure of everyday life (shoe repair, clothing repair, furniture manufacturing, etc.) suffered large-scale destruction during World War II, and only in the mid 1950s did the authorities begin systematic steps to resuscitate it. As of 1955, 584 shoe repair and sewing workshops, 1,446 clothing sewing workshops, and 67 metal repair workshops were operating in the villages of Ukraine (Panchenko, & Shmarchuk, 2000, p. 249). However, these capacities were critically insufficient. According to statistics as of 1956, 87.3% of the Ukrainian peasants continued to sew clothes and underwear for private individuals, since in 37.1 thousand out of 44,180 rural settlements there were no state workshops at all (CSAAMU, f. 2, d. 9, c. 2649, p. 28).

One of the attempts to solve this painful problem for peasants was the initiative of the Board of the Council of Industrial Cooperation of the Ukrainian SSR (1956), which proposed to the Council of Ministers to expand the network of stationary facilities and introduce the practice of mobile auto repair shops. According to the plan of the Ukrpromrad, the creation of 200 mobile good service plants based on trucks was to provide remote villages with service (CSAAMU, f. 2, d. 9, c. 2649, p. 25). This model was most actively implemented in the

western regions of the Ukrainian SSR, in particular in Rivne region, where a ring bypass of villages was practiced. As of 1964, Ukrainian villages were served by 364 mobile workshops, which covered 20% of the population of villages deprived of stationary household facilities (Sydorovych, & Lytovchenko, 2024, p. 167). However, due to a weak organizational base, a shortage of special transport and the aforementioned impassability, the work of mobile workshops at that time did not meet expectations, failing to change the overall picture of household shortages in the Ukrainian countryside significantly.

As a result, by the beginning of the 1960s, the practice of turning to private artisans for repairs and sewing clothes had remained dominant. The main reason for this situation was unchanged: an acute shortage of ateliers and stationary workshops in rural areas. According to statistics, per 100 collective farm families there were 91 cases of private tailoring, and in 66 cases this was due to the complete absence of state-owned household establishments. A similar situation was observed with shoe repair workshops. Thus, out of 30 recorded cases, 25 were performed by private artisans.

The network of rural hairdressers also functioned extremely poorly, which indicated a low level of accessibility of basic hygiene services. In particular, in Chernihiv region, out of 1,600 settlements, 1,176 did not have any such institution. This state of infrastructure forced villagers to spend a lot of time traveling to district centres or rely on private masters, which actually offset the weak steps taken by the authorities to level the differences in everyday life between the city and the countryside.

The turning point in the field of improving consumer services was the issuance of the resolution of the Central Committee of the CPSU and the Council of Ministers of the USSR On Measures to Improve Consumer Services for the Population. It placed direct responsibility for the development of the social infrastructure of the village on local Soviets (Kondufor, 1979, p. 297), which in turn shifted the solution of the problem to the local collective farms, which were recommended to invest in the construction of tailoring and sewing workshops, canteens, bakeries, and hairdressers, etc. Such a strategy created a significant imbalance between more prosperous collective farms, capable of building full-fledged consumer complexes, and economically weaker collective farms, where the modernization of life remained only on paper. In fact, the success of infrastructural evolution in a particular settlement depended not so much on national planning as on the financial capacity and initiative of local leadership. Nevertheless, the implementation of the above-mentioned resolution gave impetus to the mass construction of household facilities. Thus, in the early 1960s, new workshops began operating in the villages of Kyiv region (SAKR, f. r.-5324, d. 1, c. 345, p. 209). The network also developed dynamically in neighbouring Cherkasy region, where 22 tailoring, 17 sewing workshops and 30 hairdressing salons were established in 1960, and nine local collective farms built full-fledged household complexes at their own expense. In total, in 1960 – 1961, in the Republic, 2,330 household factories and workshops were put into operation in rural areas, as well as over 100 hairdressing salons (Kondufor, 1979, p. 297). For the systematic management of this industry in the regions of the Ukrainian SSR, the creation of specialized departments of household services began. One of the first was the corresponding department in Kyiv region at the end of 1960. Later, the practice spread to other regions of the Ukrainian SSR.

However, despite the quantitative growth of the network, the quality of service provision often remained low due to organizational miscalculations. The shortage of qualified personnel to work in rural household workshops was a significant problem. Thus, in the village of Berezniaky, Smiliansky district, Cherkasy region, as of 1961, the sewing workshop and shoe

repair point worked with constant interruptions. If the sewing workshop functioned relatively stable, then only one master worked in the shoe repair workshop who physically could not cope with the volume of orders, which inevitably led to a decrease in the quality of work (SACHR, f. r.-2920, d. 1, c. 193, p. 14).

In parallel with the development of the sphere of household services, the system of rural trade also underwent significant transformations. If in the post-war years the village shop was associated mainly with necessities (salt, sugar, kerosene), during the thaw period the state policy was aimed at transforming it into a centre of modern life. Instead of primitive huts-shops, capital buildings built according to typical Soviet designs began to appear. In some places, the construction of multifunctional facilities was practiced, where household service workshops operated under the same roof with the shop (for example, in the village of Ksaverivka, Kyiv region, 1959) (SAKR, f. r.-4804, d. 1, c. 1091, p. 35). In large villages, even the construction of two-story department stores began: in particular, in Starobeshivskiyi, Volodarskiy and Maryinskiy districts of Donetsk region, 50 such establishments were built during that period. In suburban villages, there was also a specialization of retail outlets in the sale of food, footwear, clothing and household goods.

However, despite the external signs of modernization, rural trade faced a number of systemic problems. First, the low qualification level of personnel was acutely felt; due to gaps in the training system, sellers often did not have basic customer service skills. Second, shortages and irregular supplies of essential goods remained a chronic phenomenon. The network of establishments was unevenly distributed: if in cities one retail outlet served an average of 324 people, then in rural areas 486 (CSAAMU, f. 2, d. 9, c. 2649 p. 28). The practice of serving several rural settlements with one store was popular.

To solve the problem partially, in 1957, intensive construction of new facilities began. In particular, 31 retail establishments were established in Chernihiv region (CSAAMU, f. 2, d. 9, c. 2649 p. 144), and in Dnipropetrovsk region, a line of 50 stores was put into operation and 10 mobile vans were organized to serve remote villages to which access roads had never been built (CSAAMU, f. 2, d. 9, c. 2649, p. 163).

In general, village stores became not just points of sale, but, first of all, a place of communication. The appearance of capital brick buildings with large shop windows instead of closed store-pantries psychologically changed the status of the peasant – he became a buyer and not just a recipient of rations.

An important component of the modernization of rural infrastructure was the expansion of a network of public catering establishments such as canteens, teahouses and buffets. Starting from 1953, there was a steady trend towards the quantitative growth of this network, primarily due to the creation of canteens at state farms, machine-tractor stations (MTS), rural vocational schools and schools (Rybak, 1994, p. 66).

An important step in the popularization of public catering was the reduction in prices (on average by a third) for complex breakfasts, lunches and dinners in collective farm canteens (CSAAMU, f. 5111, d. 1, c. 290 p. 76). In particular, a three-course meal in the dining room of the Kozhukhivskiyi state farm in Kyiv region cost 40 – 45 kopecks, and in the Chervony state farm in Kherson region the price was even lower – 35 kopecks. This level of accessibility was ensured by the fact that products were sold to institutions at cost, and transportation costs and fuel were covered by the farms. In the early 1960s, the stage of technological renewal of the industry began. In 1963, new dining rooms and teahouses were opened in the village of Peremoha, Pereyaslav-Khmelnyskiy district, as well as in

the Bobrinskyi, Bortnychi and Shchors state farms in Kyiv region. These establishments were equipped with modern refrigeration units and kitchen mechanisms for that time, which significantly improved working conditions and food storage, especially in the warm season (CSAAMU, f. 5111, d. 1, c. 321, p. 108).

Despite some success in the development of the public catering network, a significant part of the settlements of Ukraine remained outside the coverage of these services. The deep infrastructure gap between the city and the countryside was confirmed statistically: if in urban areas there were 37 places in catering establishments per 1000 people, then in rural areas there were only 7 (4.2%). Of the more than 7000 collective farms of the Republic, permanent public catering was introduced in only 300 farms (Korobova, 1960, p. 53).

A critical problem remained the non-compliance of many establishments with basic sanitary and hygienic standards. A striking example was the dining room of the village of Berezhnyaky, Smilyansky district, Cherkasy region. Due to the emergency condition of the premises, plaster from the ceiling fell directly into food products, and the lack of dishwashing equipment led to gross violations of hygiene (in particular, washing dishes in common containers) (SACHR, f. r.-2920, d. 1, c. 193, p. 14). Such cases were not uncommon for the rural areas of the Ukrainian SSR of that period, so peasants often gave their preference in favour of home-made food. Along with the unsatisfactory technical condition, the efficiency of the industry was hampered by the low qualification of personnel, which led to a limited assortment and low quality of cooking. To correct the situation, a system of professional training was introduced through culinary courses and circles. The method of practical mentoring turned out to be quite productive. In particular, at the initiative of Trans Carpathianco-operators, the patronage of urban institutions over rural ones was introduced: once a month, qualified cooks from the city of Khust came to the surrounding villages to conduct master classes and transfer experience to rural colleagues (Kuvnyyova, 1966, p. 83).

The fundamental component of the social infrastructure, which directly affected the quality of life and the reproduction of the labour potential of the village, was the health care system. In the mid-1950s, a gradual transition began from an extensive but inefficient network of medical assistant and obstetric stations to the development of rural district hospitals and specialized maternity hospitals.

The need to intensify medical reform during the thaw period was due to critical mortality rates among rural residents. At the beginning of the decade, the situation remained unsatisfactory: only 380 rural hospitals operated in the Ukrainian SSR, and their technical equipment was extremely low. Only 88 institutions had diagnostic laboratories, and X-ray rooms were available in only 56 institutions (Panchenko, & Shmarchuk, 2000, p. 255). There was an acute shortage of narrow-profile specialists: surgeons, paediatricians, dentists and obstetricians-gynaecologists. The material and technical base of hospitals did not meet the requirements of the time: there was a lack of beds, inventory, medicines and instruments. There was discrimination even in the nutritional standards of patients: if in city hospitals 7 rubles were allocated for a patient's daily ration. 42 kopecks, while in rural areas only 5krb. 94 kopecks (Kelembetova, 1974, p. 69).

Positive changes began after 1954 owing to a comprehensive approach to personnel and resource provision. Starting from 1956, more than 800 graduates of medical universities were sent to rural areas annually (CSAAMU, f. 2, d. 9, c. 2649, p. 51). In parallel, the construction of new medical institutions was intensified. The example of Vinnytsia region is indicative, where in 1956 there were already 196 hospitals and 174 outpatient clinics (SAVR, f. r.-2355,

d. 11, c. 38, p. 9). In Sumy region, 17 collective farm maternity hospitals were built in just 10 months of the same year (CSAAMU, f. 2, d. 9, c. 2649, p. 88).

The collective farms played a key role in the development of the industry, financing the construction from their own funds. In 1957, 36 hospitals were built at the expense of the farms, and in general, in 1959 – 1964, outpatient facilities with a total capacity of over 15 thousand visits were put into operation. The modernization of medicine was of particular importance for the western regions of the Ukrainian SSR, where endemic goitre and tuberculosis were widespread due to natural and climatic conditions, and a high level of infant mortality was also observed. The situation was stabilized only in the late 1950s with the opening of diagnostic offices and laboratories, which allowed for early detection of pathologies.

An effective model of that time was the creation of outpatient clinics that served peasants who worked on collective farms in different villages, but within the same district, simultaneously. An example of such integration was the Tartakivska outpatient clinic, which assisted residents of 25 settlements (about 11.8 thousand people). The presence of surgical, gynaecological, dental and X-ray rooms, as well as its own pharmacy, in such an institution indicated the gradual approximation of rural medicine to the standards of urban medical care (Malanchuk, 1970, p. 134).

Despite certain positive developments, the overall level of medical care in rural areas was significantly inferior to urban standards. Even in the early 1960s, the practice of placing medical institutions in adapted, poorly lit premises consisting of one room was widespread. Chronic underfunding of the industry led to the fact that there was not enough money not only to replenish the stock of necessary medicines, but also for basic heating of institutions in the autumn-winter period (Melnychuk, & Polishchuk, 2022, p. 49). The most acute problem remained the lack of specialized medical transport in most hospitals or at least adapted means of transporting people. In remote settlements, this led to critical situations: seriously ill patients and women in labour often had to be transported to the nearest district or district hospitals by horse-drawn transport. Such a delay in providing qualified care often became fatal for patients. A significant deficiency of rural medicine remained low diagnostic accuracy, due to the insufficient qualification of rural medical personnel. Misdiagnoses often led to fatal consequences. Untimely recognition of infectious diseases, in particular tuberculosis, posed a particular threat. The insufficient level of preventive medicine and gaps in preventive vaccinations created a constant danger of epidemics, which were difficult to control in the conditions of the rural infrastructure of that time.

Conclusions. A study of the evolution of the infrastructure of the Ukrainian village in the period from the mid-1950s to the early 1960s enabled us to state that this stage was a time of contradictory modernization, which combined large-scale state projects with a chronic shortage of resources. The main results of the infrastructural transformations were:

First, the creation of a technological foundation. Owing to the completion of continuous electrification and the development of communication networks, new infrastructure buildings began to function: household workshops, canteens, hospitals. However, the weak point remained the road infrastructure (only 27% of roads had a hard surface), which preserved the transport isolation of many villages.

Secondly, there was a radical transformation of rural life and the trade system. This process was marked by the transition from archaic shops with a limited range of necessities to a network of specialized stores, department stores, and household complexes. Silmah ceased to be just a place for distributing goods, gradually turning into a centre of a new consumer culture.

At the same time, during the period under study, the systemic inability of the state service sector to satisfy the population's demand fully became obvious. The fact that 87.3% of villagers continued to use the services of private artisans testified to low trust in the quality of state service, which, in turn, stimulated the development of a sustainable shadow service sector.

Thirdly, medical care for residents of the Ukrainian villages underwent evolution. The creation of a network of district hospitals and outpatient clinics significantly expanded access to specialized care. However, the effectiveness of rural medicine was levelled by the lack of medical transport and low qualifications of personnel, which only deepened social inequality between peasants and city dwellers.

Fourthly, a significant role in the development of infrastructure in the Ukrainian villages belonged to collective farms, to which the authorities shifted the financial burden of modernization. This led to uneven development of rural areas. Next to exemplary villages with two-story department stores and modern canteens, which were taken care of by economically strong collective farms, there remained thousands of settlements with emergency facilities or without them at all. Thus, the Khrushchev thaw provided a powerful impetus for the Ukrainian village to emerge from the infrastructural decline of the Stalin era. However, like all reforms of that time, it was incomplete and half-hearted. Despite qualitative changes, the differences between the city and the countryside were not levelled completely. Although residents of the Ukrainian villages, for the first time in a long time, felt like buyers and patients of the system of consumer services, trade and healthcare, the quality of these services often remained at a critically low level. This gives grounds to characterize the modernization of that time as extensive, since the quantitative indicators of the network's development significantly outpaced its qualitative content and the actual availability of services for broad segments of the rural population.

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Ruslan SIROMSKYI

PhD hab. (History), Professor of the Department of Modern World History, Ivan Franko National University of Lviv, 1 Universytetska Street, Lviv, Ukraine, postal code 79007 (ruslan.siromskyi@lnu.edu.ua)

ORCID: 0000-0002-6744-6379

Researcher ID: AAV-8751-2020

Hanna SIROMSKA

PhD (History), Assistant Professor of the Department of Social Disciplines, Lviv State University of Internal Affairs, 26 Horodotska Street, Lviv, Ukraine, postal code 79007 (asiromska@yahoo.com)

ORCID: 0000-0002-5322-4994

Researcher ID: ACV-3266-2022

Руслан СИРОМСЬКИЙ

доктор історичних наук, професор кафедри світової історії модерного часу, Львівський національний університет імені Івана Франка, вул. Університетська, 1, м. Львів, Україна, індекс 79007 (ruslan.siromskyi@lnu.edu.ua)

Ганна СИРОМСЬКА

кандидатка історичних наук, доцентка кафедри соціальних дисциплін, Львівський державний університет внутрішніх справ, вул. Гороδοцька, 26, м. Львів, Україна, індекс 79007 (asiromska@yahoo.com)

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**PRESERVATION OF NATIONAL IDENTITY IN THE ACTIVITIES
OF EDUCATIONAL ORGANIZATIONS OF CANADIAN UKRAINIANS
(late 1960s – early 1980s)**

Abstract. *The purpose of the research is to identify the main areas of the Ukrainian Canadian educational organisations' activities, evaluate their contribution to the preservation of the national identity, and clarify the achievements and challenges associated with these activities. The methodology of the research is based on the interdisciplinary approach (history, political science, sociology, pedagogy) as well as both general scientific and specialised methods, primarily retrospection and historical analysis. The scientific novelty of the research consists in the analysis of the Ukrainian diaspora educational organisations' activities based on the documents of the Ukrainian Canadian Committee and the World Congress of Free Ukrainians, while the use of the archival materials from the Sectoral State Archive of the Foreign Intelligence Service of Ukraine allows for an evaluation of their accomplishments and the challenges related to the preservation of the national identity. The obtained*

data provide a deeper understanding of the mechanisms for maintaining the national identity within the Ukrainian diaspora, particularly the role of the educational institutions in this process. It also allows for evaluation of their activities effectiveness, identification of key difficulties and success factors, and a better comprehension of both historical experience and its relevance to contemporary conditions. **The Conclusions.** The Ukrainian Canadians attributed significant importance to the educational organizations (the Coordinating Educational Council of Canada, the Regional Centre of Ukrainian School Boards, the Association of the Ukrainian Teachers of Canada), whose activities were aimed at fostering the younger generation in the Ukrainian national spirit and deepening knowledge of the Ukrainian language, history, and culture. Major achievements of these organizations during the period under study included the establishment of an extensive network of Saturday and Sunday schools, the implementation of a systematic teacher training, the creation of textbooks on the Ukrainian studies, and the preparation and conduct of cultural educational events.

Since 1971, the educational organisations' activities in Canada took place within the framework of multiculturalism policies, which opened new opportunities for the development but also presented challenges related to assimilation processes. The Ukrainian community faced several difficulties, including generational shifts, a decline in the Ukrainian language proficiency, and limited financial resources to support educational initiatives. The impact of multiculturalism policies was ambivalent: on the one hand, they created opportunities for the development of the ethnocultural initiatives; on the other, they promoted integration, which often led to a weakening of ethnic distinctiveness. The consequences of these processes included a gradual decline in the Ukrainian language proficiency among the youth, reduced engagement in community institutions, and the transformation of the national identity toward a more universal "Canadian" form. Despite these challenges, educational organizations managed to adapt their activities to new conditions, combining traditional approaches with new forms of work largely, thereby preserving the fundamental elements of the Ukrainian national identity in the Canadian society.

Key words: education, upbringing, national identity, Ukrainian Canadian Committee, Coordinating Educational Council of Canada, assimilation.

ЗБЕРЕЖЕННЯ НАЦІОНАЛЬНОЇ ІДЕНТИЧНОСТІ У ДІЯЛЬНОСТІ ОСВІТНІХ ОРГАНІЗАЦІЙ КАНАДСЬКИХ УКРАЇНЦІВ (кінець 1960-х – початок 1980-х рр.)

Анотація. Мета дослідження – визначення основних напрямів діяльності освітніх організацій українців Канади, їхнього внеску у збереженні національної ідентичності, з'ясування досягнень та труднощів у цій роботі. **Методологія дослідження** визначається міждисциплінарним підходом (історія, політологія, соціологія, педагогіка) і базується на загальнонаукових та спеціальнонаукових методах, передусім, ретроспекції та історичного аналізу. **Наукова новизна** дослідження полягає у тому, що на основі документів Комітету українців Канади та Світового Конгресу Вільних Українців осмислено діяльність освітніх організацій української діаспори, а залучення архівних надавалів Галузевого державного архіву Служби зовнішньої розвідки України дає змогу оцінити їхні досягнення та проблеми, пов'язані зі збереженням національної ідентичності. Набута інформація дає можливість глибше зрозуміти механізми збереження національної ідентичності в середовищі української діаспори, зокрема, роль освітніх інституцій у цьому процесі. Вона також уможливує оцінити ефективність їхньої діяльності, виявити ключові труднощі та чинники успіху, а відтак – краще осмислити як історичний досвід, так і його значення для сучасних умов. **Висновки.** Вагоме значення у збереженні національної ідентичності українська громада Канади надавала освітнім організаціям (Координаційна Виховно-Освітня Рада Канади, Крайовий центр українських шкільних рад, Об'єднання українських педагогів Канади), діяльність яких спрямовувалася на виховання молодого покоління в українському національному дусі, поглиблення знань з української мови, історії та культури. До основних досягнень освітніх організацій канадських українців у досліджуваній час належало формування розгалуженої мережі суботніх і недільних шкіл, запровадження системної підготовки педагогічних кадрів, написання підручників з українознавства, проведення культурно-освітніх заходів.

Починаючи від 1971 р., діяльність освітніх організацій в Канаді відбувалася в умовах реалізації політики багатокультурності, яка відкрила нові можливості для розвитку, але

водночас породила виклики, пов'язані з асиміляційними процесами. Українська громада зіткнулася з низкою труднощів, серед яких міжпоколінні зміни, зниження рівня володіння українською мовою та обмеженість фінансових ресурсів на підтримку освітніх ініціатив. Уплив державної політики багатокультурності був неоднозначний: з одного боку, вона створювала можливості для розвитку етнокультурних ініціатив, а з іншого – сприяла інтеграції, що нерідко супроводжувалася послабленням етнічної окремихності. Наслідками цих процесів стали поступове зниження рівня володіння українською мовою серед молоді, зменшення залученості до діяльності громадських інституцій та трансформація національної ідентичності в бік універсальної “канадської” форми. Попри ці виклики, освітні організації здебільшого зуміли адаптувати свою діяльність до нових умов, поєднуючи традиційні підходи з новими формами роботи, що дало можливість зберегти базові елементи української національної ідентичності в канадському суспільстві.

Ключові слова: освіта, виховання, національна ідентичність, Комітет українців Канади, Координаційна виховно-освітня рада Канади, асиміляція.

Problem Statement. The issue regarding preserving the national identity became a defining one in the Ukrainians educational organisations’ activities of in Canada during the post-war period. It became particularly relevant in the context of the profound demographic and socio-cultural changes caused by a new wave of the Ukrainian emigration (which was distinguished by its high level of education (Bilan, 2023, p. 170) and the phenomenon of the post-war “baby boom”, which expanded the youth segment of the community. Due to the need to combine the preservation of the national identity with the adaptation to the Canadian multi-ethnic and multicultural environment, it was essential to modernize the education system and coordinate educational activities (Kondrashevskaya, 2017, p. 65). The above-mentioned gave a spur to search for new approaches to the content of education, organisational forms and educational practices that would meet the challenges of the time. The educational space appeared not only as a tool for transferring knowledge under these circumstances, but also as a key mechanism for preserving the national identity. Father Vasyl Kushnir, the first president of the Ukrainian Canadian Committee (UCC), outlined the goals of schooling in the context of new realities: “The young generation of the Canadian Ukrainians must emerge strong and even-tempered, full of faith, work, sacrifice and justified hopes... We are educating our Ukrainian people in Canada to become conscious and active citizenship, not only with duties, but also with the rights, not only with privileges, but also with responsibility...” (Pershyi Vse-Kanadiiskyi Kongres, 1943, p. 8).

Review of Sources and Recent Research. There were covered certain aspects of the issue in the article, which could be found in historical studies on the Ukrainian diaspora in Canada. First of all, there should be noted the scientific study by Yuriy Neduzhko, in which he considered the educational aspects of the Ukrainian diaspora’s activities in the context of the struggle for the Ukrainian statehood restoration (Neduzhko, 2007). The scholar Maria Bilan covered the issue on the Ukrainian refugees’ integration into the Canadian society by means of education (Bilan, 2023). Inna Mashkova (Mashkova, 2015) and Svitlana Romaniuk (Romaniuk, 2014) studied the historical and pedagogical analysis regarding the Ukrainian-language education development in Canada. The study conducted by Yuliia Kondrashevskaya (Kondrashevskaya, 2017) is significant, in which the issue on preserving the diaspora’s national identity was analyzed. Some aspects of the issue on preserving the national identity of the Canadian Ukrainians were the subject of our study (Siromskyi, 2009; Siromskyi, 2010).

This study is based on the documents of the Ukrainian diaspora organizations (the reports of the educational commissions, councils) and informational notes about the life of the

Ukrainian community in Canada from the Branch State Archive of the Foreign Intelligence Service of Ukraine in Kyiv (Sectoral State Archive of the Foreign Intelligence Service of Ukraine, Kyiv – далі SSAFISU).

The purpose of the research is to determine the main areas of the Ukrainian Canadian educational organisations' activities, evaluate their contribution to the preservation of the national identity, and clarify the achievements and challenges associated with this activity.

Research Results. According to many experts, the system of education and upbringing in the Ukrainian diaspora was not very efficient and outdated in the first half of the 20th century. Antin Hlinka, the Canadian politician, public figure of the Ukrainian origin emphasized back in 1943 the following: "Due to the constant disasters of our economic system, under which our people lived in the past, our modern schooling has deviated from its true purpose. It cannot be denied that we pay more attention to things that earn us a living than to things that make life worthwhile... We were guilty of counting on the science that a person's success should be measured by the sum of money in the bank that a person has accumulated... Our assessments of values in the school sphere must be drastically changed... We need an educated and cultured nation, therefore, a smart and more modern educational school system must emerge from our post-war reconstruction" (Persnyi Vse-Kanadiiskyi Kongres, 1943, p. 87).

There were discussed educational changes on various public platforms of the Canadian Ukrainians, in particular within the framework of the Ukrainian Community, which were necessarily included supporting and affirming a high level of the national self-awareness of the young people in emigration (Krukovskiy, 2025, p. 99), involving them in the active life of the diaspora, as well as fostering a willingness to uphold democratic values and fight for the preservation of the national identity (Kondrashevska, 2017, p. 66). Taking into consideration the drastic need to coordinate the activities of the Ukrainian preschool institutions and schools in Canada, there was a need for the centralized coordination of their work, the development of specialized educational programs and teaching materials, as well as testing the feasibility and effectiveness of their application in pedagogical practice (Neduzhko, 2007, pp. 419–420).

There was held the World Educational Session (WES) within the framework of the World Congress of Free Ukrainians (WCFU) in New York in November of 1967. The result of the WES activities was the approval of the "Ukrainian Educational System" (UES), the "Educational Ideal of a Foreign Ukrainian", as well as the establishment of the World Coordinating Educational Council (WCEC). The newly created body was to play the role of a central coordination centre in the field of education and upbringing, uniting a network of regional and local councils. Hence, there emerged the structural units of the WEC almost immediately in the USA and Canada (Neduzhko, 2007, p. 425).

The Coordinating Educational Council (CEC) of Canada was established in accordance with the decision of the Educational Conference on October 12–13, 1968, at the 9th Congress of the CUC. The first plenum of the CEC was held a little more than a month later, on November 22, 1968. It was attended by representatives of the Presidium of the Ukrainian Catholic Church (Mykola Plaviuk), the National Executive of the Ukrainian National Union (Yevhen Mastykash and Vasyl Veryha), the League of Ukrainian Catholic Women, the Association of Ukrainian Educators of Canada (Kekyliya Paliiv); the Organization of Ukrainian Women of Canada named after O. Basarab (O. Maksymiv), Plast (Antonina (Tonia) Horokhovych), the Council of the Ukrainian School of the Ukrainian Orthodox Church (Natalia Kohuska), and the Union of Fine Artists of Canada (Halyna Novakivska). At the same time, the first presidium of the Coordinating Educational Council (CEC) of

Canada was elected, headed by Zenon Zelenyi (Toronto), N. Kohuska became the first deputy, and K. Paliiv became the secretary (after her death in 1969, Dr. Bohdan Stebelskyi) (Bazarko, 1986, pp. 132–133).

In general, the Coordinating Educational Council (CEC) of Canada consisted of the National Center of Ukrainian School Boards, the Association of Ukrainian Teachers of Canada, the Ukrainian Scientific Council at the CUC, the Youth of the Ukrainian National Association, the Association of Democratic Ukrainian Youth, Plast, the Union of Ukrainian Youth of Canada, the Union of Ukrainian Students of Canada, the Ukrainian Catholic Youth, the League of Ukrainian Catholic Women, the Women's Association of the Liberation League of Ukraine, the Association of Ukrainian Women of Canada, the Union of Ukrainian Women of Canada, the Association of Ukrainian Artists of Canada, the Association of Children's Literature Workers, the Union of Ukrainian Youth (SSAFISU, f. 1, c. 15708, vol. 10, p. 47). Taking into consideration the list of organizations, which became the part of the Coordinating Educational Council (CEC) of Canada, it could be stated that there was demonstrated the high activity by the Ukrainian diaspora and a wide range of its educational and cultural activities. The Committee consisted of both school and pedagogical associations, as well as the youth, cultural and women's organizations, which allowed it to cover different age and social groups of the community, and to direct efforts to preserve the language, culture and national identity. At the same time, diverse structures a priori complicated coordination, caused duplication of the functions and uneven influence on different provinces, and limited resources created additional difficulties in ensuring stable and effective activities.

It is worth highlighting the Association of Ukrainian Teachers of Canada (AUPC) with a center in Toronto among the listed organizations that were part of the the Coordinating Educational Council of Canada. First of all, because its participants were personalities, who played a prominent role in the activities of the Coordinating Educational Council of Canada, in particular Ivan Kuziv, Ivanna Kachor and Tonia Horokhovych (SSAFISU, f. 1, c. 15708, vol. 10, p. 61). The views of the latter on the development of education deserve special focus, since she emphasized the need for a systematic approach in this area constantly: "The task of parents is to bring up children in such a way that the child is subject only to benign influences from the environment and is protected from everything that is harmful in the environment outside the home. There is needed the whole system of organizations, a collective effort of the community in order to create such conditions. The system is a lot of thoughtful and coordinated measures, with the help of which an idea – a plan is brought to life" (Horokhovych, 1990, p. 65). In other words, the national identity and moral formation of a younger generation must be maintained through the collective efforts of the community, not just through home education.

There was established the National Center of Ukrainian School Councils (NCUCS), which was headed by Omelian Kalitsynskyi, at the Educational Conference within the framework of the 9th Congress of the CUC on October 12–13, 1968, simultaneously with the establishment of the Coordinating Educational Council (CEC) of Canada. The Center's goal was to coordinate the Ukrainian schooling in Canada (Biuletyn, 1975, January-March, p. 6). Its members included: the Ukrainian School Council of the UGCC, the School Curatorship of the Ukrainian Catholic Metropolis, the School Reference Office of the UNO, the School Reference Office of the Union of Ukrainian Youth, and the Association of Ukrainian Teachers of Canada (Bazarko, 1986, p. 133). The duplication of certain functions of the Coordinating Educational Council (CEC) of Canada and the NCUCS complicated the already difficult coordination and created a feeling of dispersion of the efforts.

The first members of the Coordinating Educational Council (CEC) of Canada were mainly engaged in the organizational matters, initiated the development of the educational and methodological materials on the Ukrainian language, history and culture for children, held teacher seminars, pedagogical conferences in larger centers of the Ukrainian settlement (Toronto, Hamilton, Winnipeg, Edmonton, Saskatoon) (Bazarko, 1986, p. 132). Starting in 1969, in agreement with the National Center of the Ukrainian Education Council and with the financial support of the Presidium of the Ukrainian Educational Commission, the Coordinating Educational Council (CEC) of Canada initiated a systematic inspection of the Ukrainian schools in Canada, which was headed by the educational inspector Ivan Bodnarchuk. At that time, they also began publishing the teachers' magazine "The Ukrainian School" (an editor I. Bondarchuk) – first as a bulletin of the National Center of the Ukrainian Education Council, and later on, as a bulletin of the the Coordinating Educational Council (CEC) of Canada (Bazarko, 1986, p. 134). There was raised the issue regarding revising the current school curricula at the meeting of the Presidium of the Coordinating Educational Council (CEC) of Canada on July 3, 1969. There was established a curriculum commission, which revised the curricula for primary grades of the Ukrainian schools. The new edition of the curriculum was published in 1970 in a print run of 1,000 copies. It was instructed to develop curricula for courses in Ukrainian studies, at the meeting of the Presidium of the Coordinating Educational Council (CEC) of Canada on December 19, 1970, which was implemented in March of the following year successfully. In 1971 the Presidium of the Coordinating Educational Council (CEC) of Canada issued and published school magazines and notebooks for primary grades and courses in the Ukrainian studies based on the project of Father Tymofii Minenko, and also based on the recommendations of the Teachers' Conference in Toronto on September 15, 1970 (Bazarko, 1986, p. 133). This example demonstrates the systematic and organized approach of the Coordinating Educational Council (CEC) of Canada to the modernization of Ukrainian education in Canada. It demonstrates that the Council responded to the need to update curricula, introduce new materials, and ensure their publication for wide use. It also shows the desire to ensure the quality and consistency of the educational materials, and, therefore, to strengthen the educational and cultural educational function of schools and courses in the Ukrainian studies, which was of direct importance for the preservation of the national identity among the younger generation (Kondrashevska, 2017, 67).

There was supported the idea, which was brought in by the Ukrainian schools principals, to introduce a unified approach to education in the primary grades of all schools at the meeting of the Presidium of the Coordinating Educational Council (CEC) of Canada on April 14, 1970. It was decided to switch from six to seven years of education, and to set the duration of training in the Ukrainian studies courses for five years. In addition, a unified system of education in the Ukrainian studies courses was introduced and its coordination with the curricula of "Ridna Shkola" ("Native School"). At the same meeting of the Presidium of the Coordinating Educational Council (CEC) of Canada, a network of coordination school centers was approved – in Toronto, Hamilton, Winnipeg, Saskatoon, Edmonton, Montreal, Vancouver (Bazarko, 1986, p. 134).

There was held the next plenary session of the Coordinating Educational Council (CEC) of Canada with the participation of delegates from all educational organizations on December 24–25, 1971. The report of the Presidium of the Coordinating Educational Council (CEC) of Canada was made and approved, and the plan for the next period was adopted. A new Presidium of the Coordinating Educational Council (CEC) of Canada was elected, which consisted of an

Honorary Chairman – Zenon Zelenyi (Toronto), a Chairman – Fr. Tymofiy Minenko (Grimsby), a Deputy Chairmen: Vasyl Veryha (Toronto), Natalia Kohuska (Winnipeg), Bohdan Stebelskyi (Toronto), Omelian Kalitsynsky (Winnipeg); Secretaries: Yaroslava Zorych (Toronto), Ivan Kuziv (Toronto), a Treasurer – Kateryna Maletska (Toronto). Yevhen Mastykash (Toronto) was elected a Chairman of the Control Commission (Bazarko, 1986, p. 132).

The new composition of the Coordinating Educational Council (CEC) of Canada expanded its activities, in particular in the field of coordination of educational work, initiation of pedagogical courses, publication of an information bulletin, holding conferences of teachers and educators, preparation of new school textbooks. In contrast to the traditional grammatical, analytical synthetic method of compiling textbooks in the diaspora, the use of visual auditory, conversational and auditory conversational teaching methods became a feature (Mashkova, 2015, p. 191).

Preschool education was mainly dealt with by women's organizations. There was held a meeting of the representatives of women's organization with the Presidium of the Coordinating Educational Council (CEC) of Canada in order to coordinate this important area of work on March 16, 1970. As a result, there was established the commission for the development of preschool education. The main task of the commission was to promote the establishment of kindergartens, preschool classes and nurseries. There was established the National Council of Preschool Education of Canada at the initiative of the Presidium of the Coordinating Educational Council (CEC) of Canada and with the participation of the head of the World Council of Preschool Education I. Pelenska on October 28, 1972. Its work was carried out in two directions: organizational and methodological. There were taken measures to clarify the state of kindergartens in the country in the organizational area; there was no exact data on their number, but it was determined that there were about forty of them (this, to some extent, is additional evidence of the insufficient centralization and fragmentation of the preschool education system in the Ukrainian diaspora of Canada). The curriculum and methodological department organized the preparation of a coursebook on preschool education and a textbook for working with children in kindergartens; the first part of the textbook was completed at the end of 1973 (Bazarko, 1986, p. 135).

In the Canadian provinces, there functioned various associations and societies of the Ukrainian language teachers in public schools. There was founded the Association of Ukrainian Language Teachers in particular, in Manitoba, which participated in the organization of summer courses in the Ukrainian studies for students (SSAFISU, f. 1, c. 15708, vol. 10, p. 26). In this western province, the school law was supplemented by the right to use a language other than English and French "as the language of instruction for no more than 50% of school hours for trial classes determined by the Minister of Education" (Biuleten, 1978, July-September, p. 4). The experience of Manitoba was scaled up in Canada. The Ukrainian language teachers from schools in Manitoba, Alberta, Saskatchewan, and Ontario established the Canadian Association of Ukrainian Language Teachers in Public Schools in Winnipeg. The organization's declared goal was to expand the Ukrainian schooling in the country, address professional issues (methodology, teaching system), and coordinate the activities of provincial Ukrainian language teachers in public schools (the Canadian education system in multicultural conditions also provided for teaching the Ukrainian language (Romaniuk, 2014, p. 306)). In the association's board there were included the following people: Boryslav Bilash, Yuriy Dzhuravets (the author of school coursebooks, headed the Committee of Ukrainian Teachers in the province of Ontario), Mykola Fliak (a Chairman of the UCC school board), Liuba Fedorkiv (a representative of the

Winnipeg District School Board), Omelian Kalitsynskyi (a teacher from Winnipeg), and the others (SSAFISU, f. 1, c. 15708, vol. 10, p. 40).

Despite the visible activity in the field of education and upbringing, the II Congress of the Ukrainian Educational System (UES) in 1973 stated that “The Ukrainian Educational System (UES), adopted and approved at the Ist SKE, specifies certain general educational norms, statements, means, organization and implementation. However, the heterogeneity of working conditions in different countries of our settlement does not always and not everywhere make it possible to fully implement it in practice. Its greatest inefficiency is noted in the insufficient coordination of educational actions” (Bazarko, 1986, p. 137). Were these the only problems? Obviously not, because the Ukrainian community was faced with assimilation processes, and not only assimilation under pressure from “stronger cultures” looked threatening, but also “conscious assimilation” (Siromskyi, 2009, p. 287). The level of motivation to attend the Ukrainian schools decreased, as attending them (mainly on Saturdays) meant an additional burden on children. As a result, there was a reduction in the network of such schools or a low occupancy of existing classes. Another issue was the difficulty of adapting the Ukrainian content aimed at preserving the national identity to the Canadian realities (Siromskyi, 2010, p. 396). The shortage of qualified teachers was another apparent issue. There was a shortage of qualified teachers, most of whom taught in the Ukrainian schools on a voluntary basis (schools were maintained by the local communities and their funding was often minimal).

According to the Canadian census, the number of people, who considered the Ukrainian as their native language decreased from 361,496 in 1961 to 309,855 in 1971 and 285,115 – in 1981 (Ukrainian Canadians and the 1981 Canada Census). Such kind of dynamics indicates a gradual decline in the number of the Ukrainians, who retained their native language, as well as irreversible processes of linguistic assimilation in the English-speaking and French-speaking (mainly Quebec) environment. The decline in the number of the Ukrainian speakers reflects not only demographic changes and a limited influx of new immigrants, but also the gradual integration of the young people into Canada’s multicultural society. Although the Ukrainian schools and cultural communities tried to support the native language and national identity, their efforts were limited, and a significant part of the younger generation preferred English or French, which weakened the role of the Ukrainian language in everyday life and the family environment gradually (Ukrainian Canadians and the 1981 Canada Census).

The organizational dispersion, even after the establishment of the Coordinating Educational Council (CEC) of Canada and its more than ten-year activity, created additional difficulties – from communication to the development of uniform “rules of the game”. For example, the 14th Congress of the CUC, which took place in 1983, emphasized in its resolution: “Because the preservation of the Ukrainian young generation for the Ukrainianness should be the focus of our attention, the 14th Congress instructs all Component Organizations to create and restore various forms of education, starting from kindergartens, by “Ridna Shkola” (Native School), the youth organizations and up to the time of maturity. To assist systematically and practically the youth in the formation of a conscious Ukrainian and an honest citizen” (SSAFISU, f. 1, c. 16310, vol. 6, p. 55). It was instructed to establish one All-Canadian School Board at the above-mentioned Congress, to which all other school boards at the Central CUC would be subordinate, which was tasked with “supervising all Ukrainian schooling in Canada” (SSAFISU, f. 1, c. 16310, vol. 6, p. 56). In fact, similar resolutions were adopted in the first post-war years. A school inspector Ivan Bodnarchuk noted in his report for 1980 – 1983 the following: “During the reporting period between the 10th and 13th Congresses, I concentrated my work at schools of the province of Ontario...

My general impressions: from year to year the number of students in “Ridna Shkola” (Native School) is decreasing; children of the younger generations come to school with less knowledge of the Ukrainian language, or even without any knowledge of the Ukrainian language... How the decline of our schools could be explained: a) the foreign environment in which our children grow up; b) weaker language among the parents of the younger generation and their lack of the national consciousness; c) mixed marriages, declining birth rates; d) lack of ideological and well-qualified teachers; e) irrational approach to organizing our schools; f) lack of proper coordination in both the methodological and organizational educational systems; g) decline in the prestige of our language among the younger intelligentsia” (SSAFISU, f. 1, c. 16310, vol. 6, p. 65).

In fact, these challenges were also confirmed by the Soviet special services, which monitored the situation in the Ukrainian community in Canada (Siromskyi, & Kachmar, 2022, p. 210). Hence, it was stated the following in a note from the Embassy of the Soviet Union in Ottawa dated January 9, 1985 (style preserved): “The practical achievements of the Ukrainian-Canadian community in the field of preserving the “hereditary” language during the first decade of multiculturalism look quite modest. In 1981, there were 94,5 thousand children of the Ukrainian origin of school age in Canada. 15 thousand children studied the Ukrainian language in the so-called public schools with a number of subjects taught in Ukrainian or in the Ukrainian nationalist school network, 6 thousand children used this language as a language of home communication. Thus, only one in six students in the Ukrainian community studied a “heritage” language in 1981, compared to one in two in the Jewish community” (SSAFISU, f. 1, c. 15708, vol. 11, p. 33).

In the same report there was also analyzed teaching. “The level of teaching the Ukrainian language in the so-called “Sunday” church and “native” nationalist schools is extremely low, and the costs of the Ukrainian-Canadian community to maintain these schools are maximum. In general, the costs of financing the Ukrainian schools in the country per Ukrainian in 1981 amounted to \$1,78, per Jew – \$69,87 per year”. The report further referred to the Ukrainian newspaper “Oko” (Montreal) “this is explained by the fact that only the relatives of the children who are studying pay for the education of the Ukrainian children, and the Ukrainian community in general only declares its patriotism and its Ukrainianness at every step, but does not want to actively help the Ukrainian school cause” (SSAFISU, f. 1, c. 15708, vol. 11, p. 33).

Conclusions. Thus, the educational organizations of the Ukrainians in Canada during the period under study were called upon to work to preserve the national identity of the younger generation. Due to the functioning of a network of the Ukrainian schools, cultural and educational centers and coordination structures (such as the Ukrainian Cultural and Educational Center of Canada), the work was carried out to transfer linguistic, cultural and historical knowledge to the younger generation. At the same time, the effectiveness of this activity was limited by a number of the objective factors. First of all, we mean the intensification of assimilation processes in the Canadian society, changes in the identification orientations of the young people, as well as organizational, personnel and financial difficulties that accompanied the development of the Ukrainian schooling. Despite the above-mentioned challenges, institutionalized educational activities became one of the key mechanisms for supporting the Ukrainian identity in the diaspora, even under conditions of gradual integration and assimilation.

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Oksana SALATA

PhD hab. (History), Professor, Head of the Department of historical and civic education, Borys Grinchenko Kyiv Metropolitan University, 18/2 Bulvarno-Kudriavska Street, Kyiv, Ukraine, postal code 04053 (o.salata@kubg.edu.ua)

ORCID: 0000-0003-2498-1483

Researcher ID: Y-9036-2019

Vitalii SHCHERBAK

PhD hab. (History), Professor, Department of Ukrainian History, Borys Grinchenko Kyiv Metropolitan University, 18/2 Bulvarno-Kudriavska Street, Kyiv, Ukraine, postal code 04053 (shcherbak.vitalii@gmail.com)

ORCID: 0000-0001-8025-5684

Researcher ID: ABG-5733-2020

Оксана САЛАТА

докторка історичних наук, професорка, завідувачка кафедри історичної та громадянської освіти, Київський столичний університет імені Бориса Грінченка, вул. Бульварно-Кудрявська 18/2, м. Київ, Україна, індекс 04053 (o.salata@kubg.edu.ua)

Віталій ЩЕРБАК

доктор історичних наук, професор, професор кафедри історії України, Київський столичний університет імені Бориса Грінченка, вул. Бульварно-Кудрявська 18/2, м. Київ, Україна, індекс 04053 (shcherbak.vitalii@gmail.com)

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CHYHYRYN – “HISTORICAL CITY” IN THE CULTURAL HERITAGE OF UKRAINE

Abstract. *The purpose of the article is to elucidate the history of the city of Chyhyryn as a space of “a historical city” and an object of national cultural heritage. The research methodology is based on the use of general scientific and special historical research methods, including problem-chronological, comparative historical, and functional method. The scientific novelty consists in the elucidation of a historical heritage of Chyhyryn – one of the objects of the cultural and historical heritage of Ukraine as a unique socio-cultural phenomenon. Conclusions. The historical and cultural heritage of Chyhyryn is a valuable treasury of the Ukrainian people. The city rightfully belongs to the category of “historical city”, in which important foundations of the Ukrainian past were created. Having arisen on the southern border, Chyhyryn for a long time represented the basis of the defensive shield of the region. In the middle of the 17th century the Cossacks chose it as the capital of the Zaporozhian Army – the Ukrainian state of the early modern era. Chyhyryn played an important role in the process of establishing the self-awareness of the ethnic group. The architectural complex of the city, which was*

formed over the centuries above the Tiasmyn River under Zamkova Hora, is unique. In the 19th century, the imperial authorities transformed Chyhyryn into an ordinary county town. However, it was the town which became the centre of the revival of the Free Cossacks during the Ukrainian Revolution of 1917–1921. Today, the city's significant cultural potential clearly requires further development to popularize the multifaceted national cultural heritage. A promising study is the comparison of the architecture and planning of Chyhyryn with other Ukrainian cities of the Cossack era, the influence of historical European urban models on them. The transformation of domestic cities under the conditions of the Russian Empire also remains poorly studied.

Key words: “historical city”, architectural complex of the city, cultural heritage, historical monuments, historical and cultural potential.

ЧИГИРИН – “ІСТОРИЧНЕ МІСТО” В КУЛЬТУРНІЙ СПАДЩИНІ УКРАЇНИ

Анотація. Мета роботи – розкрити історію міста Чигирин, як простору “історичного міста” та об’єкта вітчизняної культурної спадщини. **Методологія** ґрунтується на використанні загальнонаукових і спеціально-історичних методів дослідження, з-поміж іншого, проблемно-хронологічного, порівняльно-історичного, функціонального. **Наукова новизна** полягає у розкритті міста Чигирин – одного з об’єктів культурно-історичної спадщини України як унікального соціокультурного феномену. **Висновки.** Історико-культурна спадщина Чигирин є цінною скарбницею українського народу. Місто з повним правом належить до категорії “історичного міста”, в якому творилися важливі засади української минушини. Виникнувши на південному прикордонні, Чигирин тривалий час становив основу оборонного щита краю. У середині XVII ст. козацтво обрало його столицею Війська Запорозького – Української держави ранньомодерної доби. Чигирин відіграв важливу роль у процесі утвердження самосвідомості етносу. Унікальним є архітектурний комплекс міста, який формувався впродовж століть над Тясмином під Замковою горою. У XIX ст. імперською владою Чигирин був перетворений на пересічне повітове містечко. Проте саме він став центром відродження Вільного козацтва в ході Української революції 1917–1921 рр. Сьогодні наявний значний культурний потенціал міста, вочевидь, потребує подальшого розвитку для популяризації багатогранної вітчизняної культурної спадщини. Перспективним є дослідження порівняння архітектури та планування Чигирин з іншими українськими містами козацької епохи, впливу на них історичних європейських урбаністичних моделей. Маловивченою залишається також трансформація вітчизняних міст в умовах Російської імперії.

Ключові слова: “історичне місто”, архітектурний комплекс міста, культурна спадщина, пам’ятки історії, історико-культурний потенціал.

Problem Statement. Cultural heritage monuments are a kind of layer of national heritage, a chronicle of the people, which contains rich and diverse information about the development of society. Recreating its stages, recording important events in history, monuments are evidence of the originality of the evolution of the ethnic group. The historical and cultural heritage of the cities of Ukraine, like the cities of any European country, plays an extremely important role in the urban environment formation. Among them, the history of individual small but historically significant cities and towns founded during the period from the 16th to the 19th centuries is important. These are the so-called “historical cities”, to which Chyhyryn belongs as the centre of the revival of the Ukrainian statehood in the early modern era. Highlighting the city’s centuries-old past will contribute to the inclusion of domestic historical science in similar European studies of this issue and the patriotic education of the younger generation under the conditions of the Russo-Ukrainian war.

Review of Recent Research and Publications. The historical and cultural heritage of cities and the experience of protecting architectural monuments are the subject of scientific priorities of foreign and domestic scholars. In particular, P. Bourdieu and M. Green, in the

theory of a cultural capital, define heritage, first of all, as an economic value, while it includes aesthetic, historical, social, spiritual and educational components. According to P. Bourdieu, the uniqueness of “a cultural capital” consists in the combination of “inherited qualities with acquired merits” (Bourdieu, 1984, p. 245). According to M. Green, the cultural and historical heritage of the city contributes to the development of the social sphere not only at the local but also at the regional level. This heritage also brings significant profit to the economy of the region (Green, 2001, p. 173). The cultural and historical value of cities was also analyzed in the studies by U. Ulbar, L. Cazacova, A. Eldelhun and M. Mikhail. The authors came to the conclusion that the preservation and restoration of the centres of old cities is a priority task of a modern urban planning (Ulbar, Cazacova, & Eldelhun, 2010, pp. 570–574). The researchers D. Gallardo, R. Sepulveda, F. Medina, E. Diaz-Gutierrez identified the role of cultural heritage sites as important in the context of preserving the historical face of cities (Gallardo, Sepulveda, Medina, Diaz-Gutierrez, 2018, pp. 229–23). A significant factor, according to A. Wierzbicka and M. Arno, is the sacredness of individual religious heritage sites, which for many centuries constituted a key element of urban morphology and organically fit into the urban design of historical cities (Wierzbicka, Arno, 2022, pp. 63–77).

The complex of theoretical and methodological problems of modern urban studies – from the definition of the concept of “city” and the criteria for typology of cities to tracing the evolution of urban tradition in the domestic territories – is studied by Ya. Vermenych (Vermenych, 2011). The main principles of the international protection system of historical and cultural heritage of cities, preservation of the historical past of cities, popularization of urban history are elucidated by L. Prybieha (Prybieha, 2003). In the study by Yu. Mycyk “Chyhyryn – Hetman’s Capital” the origins of urban life of Chyhyryn are analyzed, its role as an important centre of the liberation struggle of the Ukrainian people in the Cossack era is outlined (Mycyk, 2016). The uniqueness of religious buildings on the topographic plan of the city of Chyhyryn in the 17th century is highlighted in the article by O. Brel and L. Kharchenko (Brel, & Kharchenko, 2016). Significant events in the history of the city and Chyhyryn region were outlined by V. Lazurenko (Lazurenko, 2004). The texts of prominent writers, historians, local historians, and foreign travellers of the 18th–20th centuries who described the monuments of Chyhyryn’s historical and cultural heritage were carefully analyzed by N. Kuksa and Ya. Didenko (Kuksa, Didenko, 2018). All this information gives a wonderful panorama of historical paintings of Chyhyryn, shows what an honourable place he was given in the work of spiritual leaders of Ukraine. The socio-cultural portrait of Chyhyryn in the 19th – early 20th centuries is presented in the study by A. Perepylycyia and S. Pavlova (Perepylycyia, & Pavlova, 2020).

The purpose of the article is to elucidate the history of the city of Chyhyryn as a space of “a historical city” and an object of national cultural heritage.

Research Results. It has been scientifically determined that historical cities are cities that preserve historical and cultural artifacts important for the people and they are symbols of significant events and markers of national history. At the same time, the term “historical city” is associated with the protection of historical and cultural heritage, to designate cities that embody the values inherent in traditional urban civilizations – the preservation of a unique face, an appropriate historical, cultural and architectural environment over the centuries.

The concept of a “historical city” first appeared in the International Charter for the Protection of Historic Cities (1987), adopted by the International Council on Monuments and Sites (ICOMOS). Its adoption was directly related to the growing threat of “cleansing” ancient cities

of the signs of the past. Although the Charter did not define the criteria for classifying cities as historic, it spoke of the need to recognize the protection of antiquity as an integral part of the policy of economic and social development of such, i.e., “historical cities”. Particular emphasis was placed on the need to preserve the planning structure of the “historical city”, including the connections between its built-up, free and green areas, as well as the character acquired by the city in the process of historical development (Vermenych, 2005, p. 573).

In domestic legislation, the term “historical city” appears in a somewhat modified form. Thus, the Law “On the Protection of Cultural Heritage” (2000) refers, in particular, to “historical inhabited place” and “historical area of an inhabited place”, and the Resolution of the Cabinet of Ministers of Ukraine of July 26, 2001 provides a list of historical inhabited places of Ukraine (it lists 401 settlements, provides information on the dates of their foundation). The historical area of the city is characterized as its part, which has preserved the ancient appearance, layout and form of development, typical of certain cultures or periods of development, and therefore the traditional character of the environment – historically inherited appearance and volumetric and spatial structure. The boundaries of historical areas of settlements must be recorded in all land management and urban planning documents. The main types of urban planning activities in historical areas of cities are regeneration and reconstruction. The historical area of the city is characterized as its part, which has preserved the ancient appearance, layout and form of development, typical of certain cultures or periods of development, and therefore the traditional character of the environment – historically inherited appearance and volumetric and spatial structure. The boundaries of historical areas of settlements must be recorded in all land management and urban planning documents. The main types of urban planning activities in historical areas of cities are regeneration and reconstruction (Vermenych, 2011, p. 114).

In Ukraine, there is a significant number of cities and towns that can be classified as “historical cities” and they require careful research and understanding. However, clear criteria for including cities and, especially, urban-type settlements in the list of historical sites have not been developed, and the issues of adapting the Ukrainian legislation to global standards of scientific development, protection and use of urban heritage have not been fully resolved. At the same time, these issues continue to remain the subject of scientific research. As P. Tronko noted, the concept of a “historical city” should include those settlements, regardless of their current status, “that accumulate intransitive socio-cultural values inherited from the past, are distinguished by authenticity and an original planning structure, and have their own unique image that leaves an imprint on all aspects of their life. The most general criteria for classifying settlements as historical cities should take into account their age, the presence of significant historical and cultural monuments, and their role as a political and spiritual centre for the surrounding area at a certain historical stage (Tronko, 1996, pp. 3–4).

It is important, in our opinion, that modern architecture does not destroy the traditional environment of the city, but complements it, introducing new meanings and content. Currently, the city of Chyhyryn, located in Cherkasy region, as a “historical city”, reflects regional architectural and urban planning traditions and historical events in the region. It has preserved not only monuments, but also a historical planning structure in the process of its development.

Chyhyryn was founded on the site of a guard outpost on the southern border of the Grand Duchy of Lithuania. This can be evidenced by the Charter of the Polish king and Grand Duke of Lithuania Sigismund I (1506 – 1548) dated September 3, 1533. It contains information from Cherkasy and Kaniv starosta Ostafy Dashkovych about the arrival of the army of the

Crimean Khan Sagib Giray at the border, which then passed along the Tiasmyn River south of Cherkasy, where the steppe zone began (Akty, 1865, p. 220). In the following decades, a settlement arose there, which was repeatedly destroyed during Horde raids, but was later rebuilt as an important centre of the fight against the Krymchaks.

In 1589, King Sigismund III of the Polish-Lithuanian Commonwealth (1587–1632) transferred Chyhyryn to the administration of Cherkasy starosta, Prince Oleksandr Vyshnevetsky. From that time on, the settlement acquired city status and became a significant military and political centre, which was granted Magdeburg right in 1592. (Pisma, 1910, p. 263). The famous Austrian diplomat, ambassador of the ruler of the Holy Roman Empire, Rudolf II Habsburg (1576 – 1612) to the Zaporozhian Sich in 1594, Erich Liasota noted in his diary the presence of a new royal city of Chyhyryn on the Tiasmyn River, which belonged to the Korsun Starostvo (Liasota, 1984, p. 109). That is, the city received a royal privilege for self-government with the right to use its own coat of arms and seal. Accordingly, the townspeople who owned real estate elected the city government, and its boards elected the mayor. The Magistrate's Council exercised control over taxes, the distribution of duties among the townspeople, and the patrol and police service. All this indicates the development of Chyhyryn according to the same paradigm as the European cities and towns of that time, forming its own historical and cultural image.



Fig. 1. Coat of arms of Chyhyryn

Self-government contributed to the rather intensive development of the city at the turn of the 16th – 17th centuries and its recognition as the centre of the newly created Chyhyryn starostvo (Pisma, 1910, p. 263). Accordingly, the infrastructure of the polis and its architectural appearance were established. The prominent Ukrainian art critic Hryhoriy Logvyn wrote the following: “A characteristic feature of the Ukrainian architecture of those times was a free picturesque composition of various structures around the main architectural centre, which dominates all buildings and together with them forms an extremely beautiful and original ensemble. An indispensable feature of such an ensemble is an organic combination with the surrounding area. At the same time, the slender architectural composition, due to its location above a lake or river, clearly emphasizes the beauty and natural features of the landscape. The architecture of Chyhyryn fully corresponded to these established traditions of ancient Russian and Ukrainian urban planning” (Logvyn, 1954, p. 19).

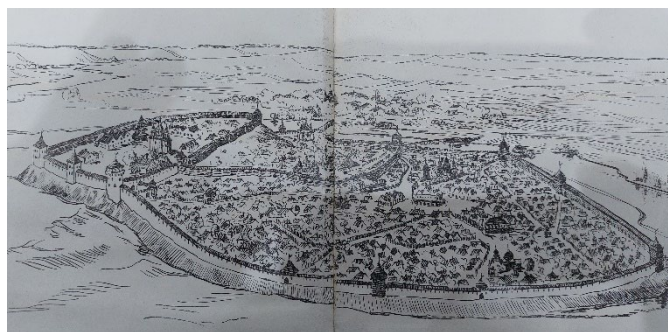


Fig. 2. Chyhyryn. Reconstruction by H. Logvin

The Chyhyryn pidstarosta Mykhailo Khmelnytsky, the father of the Hetman of Ukraine Bohdan Khmelnytsky (1648 – 1657), made a lot of efforts to develop Chyhyryn, as well as to found a number of settlements in the region. The royal census of 1616 recorded 500 Cossack and 50 burgher households in Chyhyryn (źródła dziejowe, 1877, p. 135). In the 1620s, Chyhyryn became the centre of the eponymous regiment of the Zaporozhian Army, and its population was dominated by the Cossacks. The Polish historian Ludwik Kubala, based on the lustration of 1622, highly praised the fortifications of Chyhyryn: “the castle stands on a rocky mountain, has three towers, and the Spasska Gate leads to it. There is a wooden fence made of piles around the castle, the castle is surrounded by a moat, into which water flows from the Tiasmyn. The castle has many storerooms for supplies, there are two barracks in the valley, and two more on the mountain” (Kubala, 1913, pp. 187–188).

According to an architect Viktor Vechersky, Chyhyryn Castle, like Chernihiv, Putyvl and Hlukhiv, were the most important defensive complexes of the region at that time. They were distinguished by the traditional structure and composition, but the castle in Chyhyryn was somewhat more modern, since its forms were determined by the configuration of Kamiana Hora. The scholar noted that: “The defensive fences were partly made of masonry, partly made of wood and earth. In the middle of the castle courtyard, on the spire of the mountain, there was a wooden St. Nicholas Church, the same three-part and three-storied as in Chernihiv castle. It was the main urban dominant of the environment. In the castle courtyard there were numerous one-story houses – the commandant’s, the guardhouse, the storerooms, etc.” (Vecherskyi, 2001, p. 100).

In the spring of 1648, with the beginning of the War of Liberation of the Ukrainian People, the Cossack leader Bohdan Khmelnytsky chose Chyhyryn as the capital of the Zaporozhian Army.

The presence of the Hetman’s residence intensified life in the city. The growing population significantly expanded the Lower Town – fortified with earthen ramparts, which later transformed into the city core. There was a need to modernize the castle, which was begun by B. Khmelnytsky, although under martial law the construction work was not completed. Later, they were continued by Petro Doroshenko simultaneously with the strengthening of the Hetman’s residence. As O. Popelnytska notes: “Longitudinal terraces were built on Zamkova Hora, which have survived to this day, and the Upper Castle was fortified with a moat dug in rocky soil. A well and an underground passage to the bank of the Tiasmyn were built in the castle. Stones taken from the moat were used in the construction of a new masonry

bastion – the 3-tiered “Doroshenko Tower”. On the ground floor of the tower, in casemates, gunpowder was stored and a prison was located. On the first floor, located at the level of the fortress courtyard, there were three vaulted rooms for riflemen and artillery. The second tier was an open area, protected by a parapet, with musket loopholes and cannon embrasures” (Popelnytska, 2005, p. 57).



Fig. 3. Hetman's residence

As a result, the city fortifications and the castle formed a powerful complex of defensive structures. The Turkish writer and geographer Evliya Çelebi noted about Chyhyryn: “Now it is a strong fortress with three rows of walls... The citadel stands on a steep cliff. Around the fortress are three rows of impassable moats... The fortress is located on a spacious island, to the right and left of it are floating wooden bridges. In the citadel there are the houses of Cossack warriors, all covered with rags, with vegetable gardens and orchards. There is also an armory, magnificent cannons, a monastery with a bell, similar to a tower” (Evliya Chelebi, 1961, p. 82).

In 1674 – 1676, Chyhyryn Castle was repeatedly attacked by the troops of the Moscow prince Grigory Romodanovsky and the Hetman Ivan Samoilovych. In an effort to prevent further fighting and to enlist the support of the Zaporozhian Cossacks, Petro Doroshenko stopped defending the city and surrendered his hetman's insignia to the koshovy ataman Ivan Sirko (Smolii, & Stepankov, 2001, p. 572). However, later, under pressure from circumstances, Doroshenko was forced to swear allegiance to the Moscow Tsar. As a result of these events, Chyhyryn lost its capital status, and instead a military garrison of Muscovites was stationed in the castle.

In 1677, according to the design of the Scottish fortification engineer Patrick Gordon, the castle was strengthened on the ground side with a new line of fortifications, which were connected to similar ones in the Lower Town in a single system.

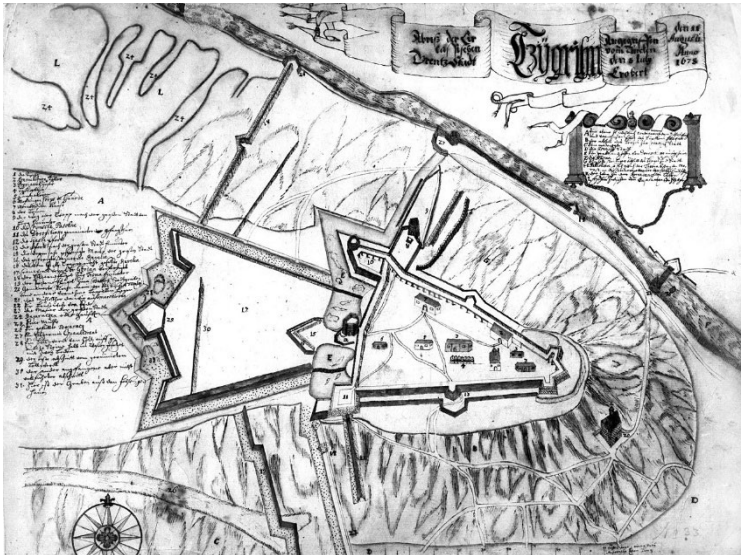


Fig. 4. Plan of Chyhyryn by P. Gordon

A schematic version of these plans was published in the 19th century as an illustration to Gordon’s “Diary”. However, as a result of the second Chyhyryn campaign in 1678, the castle was completely destroyed. In the spring of 1774, the German naturalist Johann Anton Gildensstedt, while travelling through Ukraine, recorded in his diary: “On Chyhyryn hill there used to be a fortification, they say, but now nothing has survived of it except traces of a ditch on the northern side. However, the entire surface of this hill, which is itself quite flat, is covered with small pits and mounds, in which saltpeter was produced; in addition, there are two more deep pits here, from which millstone is obtained” (Gildenshtedt, 1889, p. 8).

Today, the remains of the castle are located on the north-south elongated plateau of Bohdan (Stone, Castle) Mountain, which towers over the city. Its historical and cultural significance was denied during foreign rule. However, as a result of restoration and reconstruction work carried out during independent Ukraine, this monument has become a landmark not only in the history of the Cossacks, but also in Ukraine as a whole. Chyhyryn Castle played an important role as the fortified core of the first capital of the Hetmanate, and the rebuilt bastion of Petro Doroshenko demonstrates the power of domestic defensive fortifications of the Cossack era.

At the beginning of the 18th century Chyhyryn again came under the jurisdiction of the Polish-Lithuanian Commonwealth, which was characterized by rampant political anarchy in Right-Bank Ukraine and the merciless devastation of the region. This event created favourable soil for social and national confrontation. Accordingly, the city found itself in the epicenter of the mass popular movement of the Haidamachchyna. It is no coincidence that part of Taras Shevchenko’s poem “Haidamaky” is entitled “A Feast in Chyhyryn” in the poem dedicated to the uprising led by Maksym Zalizniak in Koliiv region in 1768 (Shevchenko, 1988, pp. 98–110).

After the final liquidation of the Ukrainian early modern state in the 1880s, the cities of sub-Russian Ukraine developed in accordance with general imperial tendencies, the most important of which was “regularity” – the regulation and unification of all aspects of public life. In the county cities, which was then Chyhyryn, a single urban planning method was used – an orthogonal

network of streets (Vecherskyi, 2001, p. 235). Based on the cartographic plan of Chyhyryn, an architect William Geste elaborated a city development project in 1826, approved by Emperor Nicholas I (1825 – 1855) and included in the complete code of laws of the Russian Empire. Thus, a choice was made in favour of a gradual transition from unsystematic to planned development. Along with a rectangular network of streets divided into 53 blocks, three squares were founded, where administrative buildings were located and trade was held. Later, according to the design of the public engineer M. Ikonnikov, the premises of the city council, court and hospital were built (Perepylycyia, Pavlova, 2020, pp. 64–65).

Religious buildings were also built in the city, the beginnings of which can be traced back to the 16th century. Thus, in the will of the Chyhyryn Cossack Tyshko Volevych, written around 1600, the name of the Holy Saviour Church appears (Kryvoshiy, 2011, p. 50). Its existence is also recorded in the historical and political treatise “History of the Rus”. It is reported that in 1596 the Cossack officers Bohun, Voinovych and Sutyha, hanged by the Poles, were solemnly buried “in the Cathedral Church of the Transfiguration of the Lord with an inscription on the graves about their innocent suffering for their homeland and the Orthodox faith” (Istoriia Rusiv, 1991, p. 77). The existence of this temple is also confirmed by Chyhyryn’s plan of 1677, which is stored in the Diplomatic Archives of the French Ministry of Foreign Affairs in Paris among the reports of the French resident in the capital of the Ottoman Empire, Charles O. Nuantel, to King Louis XIV (1643 – 1715).



Fig. 5. Plan of the city of Chyhyryn

In 1617, the Holy Trinity Monastery was founded on the outskirts of Chyhyryn, which became a nunnery in 1735 (Kileso, 2000, p. 84). After repeated destruction and reconstruction, we can see the remains of the monastery buildings – the churches of the Holy Trinity and the Transfiguration of the Lord with a bell tower, as well as individual cells (Central State Historical Archive of Ukraine in Kyiv (CSHAUK), f. 181, d. 1, r. 8, p. 4). These historical monuments were recorded in Taras Shevchenko’s painting “The Chyhyryn Convent”. The Arab traveller, an archdeacon, and a writer Pavlo Alepposky, in describing his journey across Ukraine, mentions the name of another Chyhyryn church – “in honour of the Assumption of the Blessed Virgin Mary, which is next to the Hetman’s house” (Puteshestvie, 1898, p. 192).

The brick church of St. Apostles Peter and Paul on the slope of Zamkova Hora was also unique in its architecture.



Fig. 6. Church of St. Peter and Paul

Its architectural style is similar to the Ilyinsky Church in Subotiv. According to a historian Lavrenty Pohilevich, in this church Hetman Petro Doroshenko's associate, Yosyp Neliubovych-Tukalsky, was elected Metropolitan of Kyiv, Galicia and All Rus' and later buried there (Pohilevich, 2007, p. 522). According to updated information, he was buried in the Holy Trinity Monastery. In 1677 – 1678, during the battles for the city, the Metropolitan's ashes were transferred from Chyhyryn to the Mharsky Monastery in Lubny (Popovanova, 1997, p. 100). In the summer of 2007, the rebuilt church was consecrated, where divine services and all traditional church rituals are held. A monument to Metropolitan Joseph Neliubovych-Tukalsky (a sculptor Vladyslav Dymion), who was canonized by the Orthodox Church of Ukraine as a saint at the Synod on November 22, 2021, is located nearby.

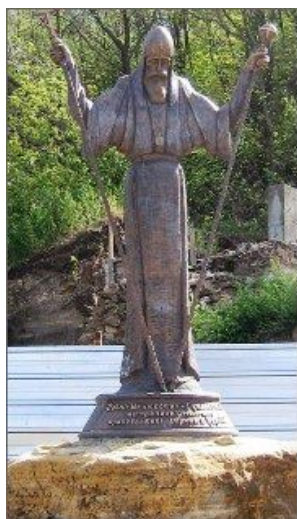


Fig. 7. Monument to Joseph Tukalsky

Among the religious buildings of the 19th century, the most notable was the Exaltation of the Holy Cross Cathedral on the central street of the city, built by order of Hetman Petro Doroshenko on the Zatiasminska side. Judging by the correspondence with the Kyiv Spiritual Consistory about sending a report on the amount of funds for the maintenance of the cathedral, Hetman paid great attention to it (State archive of Cherkasy region – SACR, f. P-660, d. 1, r. 1606, p. 7). However, we only have a mention that the Church of the Assumption of the Blessed Virgin Mary continued to operate in Chyhyryn, noted on one of the pages of an archival document (CSHAUK, f. 725, d. 1, r. 5, p. 16). Finally, at the end of the 19th century, the temple of the Kazan Icon of the Mother of God was rebuilt on the site of the destroyed one. During the Hetmanate era, the Cossacks often gathered at the large open square around it (SACR, f. P-660, d. 2, r. 11, p. 131).

At the same time, the architectural ensemble of Chyhyryn was supplemented by a number of civil buildings, first of all, the building of the city council and the county council – “Prysutsveni mistia”, which was considered a model of classicism. You can learn about the activities of the City Magistrate from the sworn letters of the townspeople (CSHAUK, f. 947, d. 1, r. 24, p. 3). The parish school premises, the buildings of the church-parish schools, and the Spiritual Board building became a significant addition to the urban space.

At the same time, as a district centre, there was a slow growth in the number of townspeople. In 1837, according to the “Ethnographic Description of Chyhyryn” by M. Bilozersky, 5,117 people lived in the city, and according to the first general census of the Russian Empire – 9,872 residents in 1897 (Pervaya, 1904, p. V). Apparently, this was due to the certain distance of Chyhyryn from existing transport highways. In the statistical description of the Kyiv province, it was noted, in particular, that Chyhyryn was neglected and disorderly, “the city cannot be compared even with neighbouring towns, especially with Smila and Kremenchuk, which attracted the population of Chyhyryn district” (Funduklej, 1852, p. 453).



Fig. 8. Taras Shevchenko. Chyhyryn from Subotivskyi Road

The Polish historian Franciszek Rawita-Gawronski recorded similar impressions during his trip to Ukraine: “Other cities have risen materially, expanded, developed industry and trade – but Chyhyryn sits on the sidelines and in poverty” (Rawita-Gawronski, 1901, p. 7).

Only at the beginning of the 20th century did the socio-economic life of Chyhyryn experience a rather dynamic development, interrupted by World War I (1914 – 1918). The events of the Ukrainian Revolution of 1917 – 1921 led to the intensification of social processes in Chyhyryn region. The struggle for the revival of one’s own state encompassed broad sections of the people. On October 16–20, 1917, the All-Ukrainian Congress of the Free Cossacks was held in Chyhyryn, at which 200 delegates represented a 60,000-strong detachment of descendants of the Zaporozhian knighthood. At the congress, the General Council of the Free Cossacks was established, the organization’s charter was drawn up, and the commander of the First Ukrainian Corps, General Pavlo Skoropadsky, was elected military ataman.



Fig. 9. Pavlo Skoropadsky

The appeal to the Ukrainian people explained the goals and objectives of the organization in support of the Central Rada (Lobodavev, 2010, p. 69). For several years, the inhabitants of Chyhyryn and its environs took an active part in the struggle against the Bolshevik horde and Denikin’s troops. However, the activities of the centurion ataman of the Free Cossacks Svyryd Kotsur in Chyhyryn region testified to the absence of stable political convictions among the Ukrainian peasantry during the period of the revolution and civil war (Solodar, 2002, p. 4).

In the Soviet era, Chyhyryn received the status of a district centre (1923) with traditional principles of administrative management and development of the socio-cultural sphere. Slow economic growth, lack of funds for professional projects for the regeneration of the historical centre of the city, the so-called downtown, led to the loss of the identity of the urban planning structure and its architecture, significantly complicating these processes. An exception, perhaps, can be considered the revival of the city park (since 1953 named after Taras Shevchenko). The Soviet holidays and other mass events were solemnly celebrated on its territory. The creative arrangement of the object led to its obtaining the status of the State Park-Monument of Landscape Art of Local Importance in 1972. In 1989, a bust of the Great Kobzar was installed in the park (a sculptor Olena Shalimova, an architect Yuri Somikov).

At the same time, the Resolution of the Republic of Ukraine of September 18, 1965 “On the Perpetuation of Memorial Sites Related to the History of the Zaporizhian Cossacks” played a significant role in the revival of cultural heritage monuments in Chyhyryn region. In particular, the Cherkasy Regional Council decided to erect the monument to Bohdan Khmelnytsky on Zamkova Hora. Its grand opening took place in October 1967. However,

later the monument had to be reconstructed and only since 1974 the bronze sculpture of the Hetman on a granite pedestal (the authors: an architect Vasyl Hniezdilov, the sculptors Makar Vronsky and Oleksiy Oliynyk) became a symbol of Chyhyryn, its visiting card.



Fig. 10. Taras Shevchenko Bust



Fig. 11. Monument to Bohdan Khmelnytsky

In 1989 the painstaking work of local historians and local historians and their significant achievements became the basis for the creation of the State Historical and Cultural Reserve “Chyhyryn” (in 1995 it was granted the national status), which includes: the Bohdan Khmelnytsky Museum in Chyhyryn, the Museum of Archaeology of the Middle Dnieper Region, the Subotiv Historical Museum, the Medvediv Museum of Local Lore, the ethnographic museum “Ukrainian Hut of the Late 19th – Early 20th Centuries” in the village of Stetsivka. A unique pearl of the reserve is the rebuilt (2009) “Residence of Bohdan Khmelnytsky”, from where the administration of the Ukrainian Cossack state was carried out.

The period of Ukraine’s independence was marked by significant changes in the development of the legislative framework designed to provide a foundation for the preservation of such historical cities as Chyhyryn. This is also provided for in the Resolution of the Cabinet of Ministers of Ukraine dated September 3, 2009 No. 928 on cultural heritage sites of national importance, which are entered into the State Register. Among about 900 immovable monuments, there are also monuments in Chyhyryn (Dodatok, 2009). But the funds allocated by the state and local communities do not always allow for the preservation and proper restoration of historical and architectural monuments, and the perpetuation of legendary heroes of the past. At the same time, the residents of the city make efforts to ensure that Chyhyryn continues the traditions of Cossack glory and preserves its historical heritage for future generations.

The following people were born in Chyhyryn: Hetman Petro Doroshenko, the organizer of public education Serhiy Hrushevsky, a composer Vasyl Zavadsky, a historian Andriy Yakovlev, Doctor of Chemical Sciences Vasyl Nazarenko, a museum historian Mykhailo Sikorsky, and Doctor of Physical and Mathematical Sciences Kateryna Yushchenko. At the same time, Chygyryn land was visited by famous scientists, writers, poets and artists: Mykola Markevych, Taras Shevchenko, Mykola Kostomarov, Panteleimon Kulish, Tomasz Padura, Pavlo Chubynsky, Johann Anton Gildenstedt, Volodymyr Antonovych, Michal Hrabovsky, Vikenty Khvoika, Borys Hrinchenko, Dominique Pierre De la Flize, Mitrofan Alexandrovych, Ilia Repin, Franciszek Ravita-Gavronsky, Johann Heinrich Münz, Kliment Kvitka, Hnat Stelletsy, Dmytro Doroshenko, Hryhoriy Lohvyn, Ivan Honchar and the others, who preserved, popularized and multiplied the history of the region.

Conclusions. The historical and cultural heritage of Chyhyryn is a valuable treasury of the Ukrainian people. The city rightfully belongs to the category of “historical city”, in which important foundations of the Ukrainian past were created. Having arisen on the southern border, Chyhyryn for a long time represented the basis of the defensive shield of the region. In the middle of the 17th century the Cossacks chose it as the capital of the Zaporozhian Army – the Ukrainian state of the early modern era. Chyhyryn played an important role in the process of establishing the self-awareness of the ethnic group. The architectural complex of the city, which was formed over the centuries above the Tiasmyn River under Zamkova Hora, is unique. In the 19th century, the imperial authorities transformed Chyhyryn into an ordinary county town. However, it was the town which became the centre of the revival of the Free Cossacks during the Ukrainian Revolution of 1917 – 1921. Today, the city’s significant cultural potential clearly requires further development to popularize the multifaceted national cultural heritage.

A promising study is the comparison of the architecture and planning of Chyhyryn with other Ukrainian cities of the Cossack era, the influence of historical European urban models on them. The transformation of domestic cities under the conditions of the Russian Empire also remains poorly studied.

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Ulyana MOVNA

PhD hab. (History), Leading Researcher of the Institute of Ethnology, National Academy of Sciences of Ukraine, 15 Svobody Avenue, Lviv, Ukraine, postal code 79000 (movlana@ukr.net)

ORCID: 0000-0002-9763-2455

Olexandr KUKHARENKO

PhD (Philology), postdoctoral fellow at the Institute of Ethnology, National Academy of Sciences of Ukraine, 15 Svobody Avenue, Lviv, Ukraine, postal code 79000 (art-red@ukr.net)

ORCID: 0000-0001-5421-1004

Уляна МОВНА

докторка історичних наук, старша дослідниця, провідна наукова співробітниця, Інститут народознавства Національної академії наук України, проспект Свободи, 15, м. Львів, Україна, індекс 79000 (movlana@ukr.net)

Олександр КУХАРЕНКО

кандидат філологічних наук, Інститут народознавства Національної академії наук України, проспект Свободи, 15, м. Львів, Україна, індекс 79000 (art-red@ukr.net)

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**DEFINITION OF UNIVERSAL RITUAL STRUCTURE
ON THE EXAMPLE OF UKRAINIAN FAMILY RITUALS**

Abstract. *The purpose of the article is an attempt to create a structure of an averaged and universal rite, which would be suitable, if not for all, then for the majority of ritual actions. **Research Methodology.** The method of structural and functional analysis has been used, which according to the authors, contains a significant potential for further research, in particular, of the Ukrainian folk rituals. **The scientific novelty** consists in the fact that after A. van Gennep, K. Levi-Stros, M. Eliade and their followers, no successful attempts to create an effective ritual structure have been made. **Conclusions.** Unlike dramatic action, for which all elements of the composition are important, ritual action is completely satisfied only with the climax. At the same time, for the ritual, it is the climax episode that is original and unique. All other episodes into which the ritual action is divided are auxiliary and they are combined into seven groups according to the nature of the action: 1) invitations (i), 2) visits (v) and returns (r), 3) creation of a ritual attribute (a), 4) agreements (ag), 5) veneration of sacred actions, elements, objects (s), 6) blessings and gifts (b), 7) feasts and festivities (f). Having examined in detail and compared nine family rituals from the wedding, funeral, and childbirth cycles, we obtained enough schemes to determine a universal ritual structure that would be acceptable for most traditional ritual actions: $i+v+[s+a+ag+b+C(c)+f]+r$.*

It should be noted that the ritual, at least a family one, always begins with invitations and the arrival of the participants to the place of its holding. It ends with the return to their own homes. The other six elements, such as honouring the sacred, creating a ritual attribute, agreements, blessings,

feasting, and culmination, may change their order and location, but they are, in most cases, present in each specific ritual. If we apply the same procedure to other rituals that make up the three mentioned family cycles, we will obtain, if not the same, then very close results. And this once again proves the right to the existence of a universal ritual structure determined as a result of this study.

Key words: ritual, structure, structural and functional method, Ukrainian family rituals.

ВИЗНАЧЕННЯ УНІВЕРСАЛЬНОЇ РИТУАЛЬНОЇ СТРУКТУРИ НА ПРИКЛАДІ УКРАЇНСЬКИХ РОДИННИХ ОБРЯДІВ

Анотація. Метою статті є спроба створити структуру усередненого й універсального обряду, яка підходила б, якщо не для всіх, то для більшості ритуальних дійств. **Методи дослідження.** Використано метод структурно-функціонального аналізу, що, на думку авторів, містить значний потенціал для подальших досліджень, зокрема, української народної обрядовості. **Наукова новизна** полягає у тому, що після А. ван Геннепа, К. Леві-Строса, М. Еліаде та їхніх послідовників не з'явилися наскільки ж успішні спроби створити дієву структуру обряду.

Висновки. На відміну від драматичної дії, для якої важливі всі елементи композиції, дія обрядова цілком задовольняється лише кульмінацією. При цьому для обряду саме кульмінаційний епізод є оригінальним і неповторним. Усі інші епізоди, на які розподіляється обрядова дія, – допоміжні й за характером дії об'єднуються у сім груп: 1) запросини (з), 2) приходи й повернення (п), 3) створення обрядового атрибуту (а), 4) домовленості (д), 5) пошанування сакральних дій, стихій, предметів (с), 6) благословення й обдарування (б), 7) гостини й гуляння (г). Детально розглянувши й порівнявши між собою дев'ять родинних обрядів із весільного, поховального й родильного циклів, ми отримали достатньо схем для того, щоб визначити універсальну ритуальну структуру, що буде прийнятна для більшості традиційних обрядових дій: $z+n_1+[c+a+d+b+K(k)+z]+n$.

Доцільно зазначити, що обряд, принаймні родинний, завжди починається із запрошень і приходу учасників до місця його проведення. Закінчується – поверненням до власних осель. Інші шість елементів, такі як пошанування сакрального, створення обрядового атрибуту, домовленості, благословення, гостини й кульмінація, можуть змінювати свою черговість і розташування, але вони, в більшості випадків, присутні в кожному конкретному обряді. Якщо таку саму процедуру вжити до інших обрядів, що складають три вказані родинні цикли, отримаємо, якщо не ті самі, то занадто близькі до зазначених результати. А це зайвий раз доводить право на існування універсальної ритуальної структури, встановленої у результаті цього дослідження.

Ключові слова: обрядовість, структура, структурно-функціональний метод, українські родинні обряди.

Problem Statement. Structural and functional research analysis, which reached its peak of popularity in the 1950s and 1960s, remains quite promising today. The proof of the above mentioned statement should be the study in which we will try to determine the universal ritual structure of the Ukrainian family rites. In this case the authors are not original, since the search of the most effective, harmonious and logical structure of the ritual and its construction has been carried out by a significant number of researchers – ethnologists, anthropologists, cultural scholars. But only some of them managed to get close to certain results in this direction. Owing to their studies, the scientific community received the doctrine of rites of transition, a structural and functional method for studying rituals and myths, and a new idea of the concept of a mythological worldview.

Review of Recent Research and Publications. The reception of ritual action and its structure were studied by Arnold van Gennep, Claude Levi-Stros, and Mircea Eliade. It should be noted that this research focuses on this narrowly defined direction based on the studies of the indicated scholars.

Arnold van Gennep saw the transition of the main character of the ritual from a certain social status to a qualitatively different one as the basis of the ritual structure. Among the

mass of ritual forms of various peoples, he managed to find a certain regularity, namely, structure. In a separate group, the scholar singled out the rituals of the predominantly family cycle, which accompany birth, childhood, reaching a social maturity, engagement, marriage, pregnancy, fatherhood, joining religious communities, funerals (Maierchuk, 2011, p. 38).

In the section devoted to the classification of rites, Arnold van Gennep identifies several groups into which they are divided. Moreover, these groups are antagonistic and dual: rites are sympathetic and contagious, positive and negative, direct and indirect, animistic and dynamic. For practical understanding, the author gives the following examples: when a pregnant woman observes the taboo of not eating mulberries so that it does not affect the newborn, she performs a dynamic contagious direct negative rite; if a sailor brings a model of a ship as a gift to the Virgin Mary, so as not to perish at sea, this is an animistic sympathetic mediated positive rite (Gennep, 1999, p. 14). The researcher believes that when the classification of the mechanisms of a ritual activity is sufficiently developed, the meaning of the sequence of ceremonies that make up a particular rite becomes available. Arnold van Gennep suggested a scheme of transition rituals consisting of preliminal (separation), liminal (transition) and postliminal (aggregation) rites, which perform the functions of exclusion, intermission and inclusion in a certain social group (Gennep, 1999, p. 15).

Instead, Mircea Eliade believed that any ritual – calendar, labour, family – reflects the process of creating our world, when the transition from Chaos to the stage of Order took place (Eliade, 2001, p. 45). At the same time, dual criteria are also indicated: Chaos – Cosmos, which generate opposition and the emergence of conflict as the main driving force for the possibility of conducting a rite. Other dual pairs are associated with this pair of oppositions, such as, for example, everyday – ritual, secular – sacred, centre – periphery, death – rebirth (Eliade, 1958, p. 106). “In the details of his own conscious behaviour, a primitive archaic human being does not know an action that has not been performed and experienced before by someone else, and not a human being. What a human being does it has been already done. His life is a continuous repetition of actions discovered by others” (Eliade, 1949, p. 29), – wrote the scholar in his programmatic study “The Myth of Eternal Return”, published in 1949. Therefore, any ritual, any rite has its own sacred model or its own archetype (Eliade, 1949, p. 40).

Claude Lévi-Stros, connecting ritual with mythology, divided it into two systems – a system of names and a system of attitudes. Thus, he asserted a given structure of ritual, in which the rite is divided into separate elements. Each element of this structure, according to the researcher, has a clearly defined action, meaning and nature, which makes it possible to understand the meaning inherent in the ritual action (Levi-Stros, 1958, p. 44).

The main goal that Claude Levi-Stros set himself was to show that all the various phenomena of society and culture, including rituals, are modifications of some initial single model. That is why, all rituals must be strictly systematized, classified, and the connections between them must be revealed, demonstrating their relationship to each other or to the initial model (Levi-Stros, 1962, p. 68).

The three researchers mentioned above used their own, different from others, methods and approaches. The only thing that united their aspirations was the attempt to create a single methodology for interpreting the meaning of a ritual action, in order to later, by breaking down each rite into elements, decipher the information embedded in it (Kukharenko, Diedkov, Vysheslavskiy, Mozulenko, Taran, 2024, p. 102).

The purpose of this study is to make an attempt at creating a structure of an averaged and universal rite that would be suitable, if not for all, then for the majority of ritual actions. Let

us turn to those researchers and their teachings who, in our opinion, are of direct importance for the objectives in this study.

Research Results. Studying the Ukrainian folk rituals of the family cycle, the authors of the study came to the conclusion that the entire ritual action is easily declassified into components. Here, it would be appropriate to compare the research of an ethnologist with the activities of either a writer or a director of a theatre or cinema, when a dramatic action is divided into pieces and tasks are determined for its characters (Stanislavskij, 1951, pp. 166–169). The relevance consists in the fact that dramatic action and ritual action unfold similarly, often analogously, according to the same laws. However, if for the director's division the composition with all its components (exposition, plot, development of the action, climax and denouement) is important, then for the ethnologist it is enough to determine only the climax – the highest point of tension in the development of the conflict (Guzhva, 2012, p. 207).

When each of the cycles of wedding, funeral, and childbirth rituals was declassified into components called episodes, it turned out that only the culminating moments were original for the ritual action. For example, for the wedding rite of engagement, a girl presented towels to matchmakers and a handkerchief to a young man, for the funeral rite at the cemetery, the priest “sealed” the deceased's grave, and for the childbirth rite, a woman gave birth to a baby. All other episodes, except for the climax, are auxiliary and are divided into seven groups by the nature of the action: 1) invitations (i), 2) visits (v) and returns (r), 3) creation of a ritual attribute (a), 4) agreements (ag), 5) veneration of sacred actions, elements, objects (s), 6) blessings and gifts (b), 7) feasts and festivities (f). The eighth group, or two – the eighth and ninth – groups, are two types of climaxes: Culmination episodes in which a transition to a new status occurs (C), and culminations where such a transition is not foreseen (c).

When a young man asks his fellow villagers to marry him off to a girl – this is *an invitation*, when a bride and her friends eat a branch during the torochyn – this is *the creation of a ritual attribute*. If during a funeral a priest conducts a great service near the body of the deceased – this is *the veneration of sacred actions*, elements, objects; the participants of the funeral return to the homestead of the deceased for a memorial dinner, and after it they go home – *visits and returns*. In the soil under the tyn (hedge), placenta is buried and the water is poured out after the baptism of a baby and also the water is poured after a woman in labour took a bath – *an agreement* between representatives of the real world and the afterlife; the godparents bring the baby bread, bagels and kryzhmo – *blessings and gifts*; a festive dinner after the baptism – *feasts and festivities*. However, the ability to declassify the rituals into episodes and combine them into groups does not give the right to speak of the structure of the ritual as complete and finished.

For the concept of forming a ritual structure, the dual and ambivalent concepts of the origin of the conflict are of great importance – the real world and the afterlife. There are many other oppositions, but they are secondary in comparison with the above mentioned. Thus, for the wedding cycle of rituals, such concepts are: a male – a female, a young man – a maiden, a groom – a bride, a young man – a young woman, a husband – a wife. For the funeral: life – death, alive – dead, a house – a coffin, a dwelling – a grave. The ambivalent concepts of the birth cycle include: defilement – purification, a pregnant woman – a woman in labour, a newborn – a baptized, fellow villagers – godparents. But all these concepts, upon detailed consideration, will boil down to the fact that one of each pair will necessarily relate to the real world, and the other – the afterlife.

This statement requires further explanation. The rite, as a means of transition for the main characters from one status to another, becomes possible through interaction with the

afterlife (Movna, 2023, p. 33). The afterlife is another invisible world that is the antipode, i.e. the complete opposite of a real life, where deceased ancestors, supernatural beings, and demonological characters live, from there newborn babies come to reality, and the dead go there after death. Two worlds – reality and the afterlife – are separated and isolated from each other. However, at certain times, on the eve of the greatest holidays – Easter and Christmas – there is an interaction between these worlds. On the eve of the Holy Supper, deceased ancestors come to the house of their descendants (Voropai, 1958, p. 53–54), and on the night from Maundy Thursday to Good Friday, all the dead from the cemetery go to church for a prayer service (Kylymnyk, 1962, p. 66).

Moreover, without the influence of the afterlife on reality, it is impossible to achieve the goal of any rite: the deceased cannot become the deceased, the newborn cannot become a full-fledged person, and a young boy and a young girl cannot have the status of a husband and wife (Yastremska, 2021, pp. 188–190). This influence is called sacralization – the consecration of reality with the energy of the afterlife. It is the connection with the afterlife, ritual actions and ritual statuses that make it possible to carry out the intended and fully conduct the rite (Movna, 2025, p. 168). Regarding statuses, it should be noted that a young man and a young woman cannot immediately become spouses; they must enter the ceremony, be sanctified by the energy of the afterlife, accept the statuses of first a young boy and a young girl, then the groom and the bride, and only after that become full-fledged spouses and leave the ceremony. Thus, the statuses of a young man and a young woman, a husband and a wife belong to reality, while a groom and a bride exist only within the ceremony. Everything mentioned regarding reality and the afterlife is the legacy of a collective idea of the universe, which determines certain actions within the framework of certain ceremonies.

Now let us return to the episodes distributed by the nature of the action in order to suggest a universal and clearly constructed structure of the rite. It is quite logical that the rite should begin with the visit of its participants to the place of ritual actions, and end with the return of each to their own home. Therefore, the first stage or episode should be the visit, and the last – the return. However, logic is not always useful when it comes to a purely scientific approach to research. Any logical, at first glance, thoughts and conclusions should be proven or refuted. Especially when you keep in mind that the object of study is folk rituals, and among the nature of the actions of the episodes there is such a thing as invitations. Therefore, invitations should precede the arrival of the participants to the place of the ceremony. Thus, in the wedding cycle, a groom invites fellow villagers to be the elders, parents of a bride and a groom invite the bread-making women (korovai and cones), a bride and a groom themselves invite guests to the wedding. In the funeral cycle, the relatives of a dying person invite a priest and women. In the birth cycle, a father of a newborn invites close people to become godparents. And only after this procedure do the elders, breadmakers, wedding guests, a priest and women come to a dying person, godparents to parents of a newborn to go to church for the christening. Based on this, *invitations* should be put in the first place, *visit* – in the second place, and *return* – in the last place.

In the wedding ritual cycle of the so-called full rites, i.e. rites of transition, during which the main characters change their own statuses, there are three – engagement, wedding and pantry. Similarly, we have three rites in the funeral cycle – departure of the soul, burial in the cemetery, memorial dinner, and the maternity cycle – childbirth, naming, christening. However, we will study not only those rites where a transition is made, but also the others in which there is no such transition.

The matchmaking ritual (Chubynskij, 1877, pp. 56–65), like most traditional rituals, begins with *invitations* – a young man invites respectable villagers to ask a girl to marry him. The matchmakers come to a young man’s estate, and then to a girl’s house – *the visits* (*v*). A young man hands the matchmakers bread and sticks – *honouring sacred actions, elements, and objects*. The matchmakers’ performance of the traditional matchmaking ritual – *creating a ritual attribute*. The fact that the parents and a girl agree to the engagement is nothing more than a *culmination*. However, it is a simple *culmination* (*c*), since after it neither a young man nor a girl changes the status. But such a climax should be also considered as *an agreement* (*ag*), since it is precisely the agreements that both parties reach in this episode. There is no *blessing* (*b*) yet, but there is a feast during which the hosts treat the elders and neighbours who are invited “for the first drink”. The return to one’s own home occurs when the engagement is postponed to another date, and not immediately after the matchmaking. Let’s depict this rite schematically and obtain the following formula, where *v* – visit, *r* – return, and all other symbols are defined above:

$$i+v+s+a+c(ag)+f+r$$

A much more complete rite of the wedding cycle from the point of view of the transition to new statuses of the main characters is the engagement (Chubynskij, 1877, pp. 65–95). A young man, if he stayed at home and did not go with the elders, and his parents are informed that a girl is engaged. This is nothing more than *an invitation*, since after the announcement, a young man with his friends, the father with his mother, and a girl’s friends gather and go to the house of a girl’s parents – *visits* (*v*). A girl gives the matchmakers towels, and the young man – a handkerchief. This is the *Culmination* of the *transition* (*C*), because after such a ritual action, the young man becomes the groom, and the girl becomes the bride. However, this episode also has another purpose: by giving the elders towels, she honours *the sacred*, (*s*) and by tying a handkerchief on the groom’s hand, she creates a *ritual attribute* (*a*). The parents *bless* (*b*) a bride and a groom with bread, using icons. Representatives of the two camps – a groom and a bride – arrange negotiations about the dowry, wine, the terms of the wedding and the wedding – *agreements* (*ag*). Treating guests and celebrating – *a feast* (*f*). The guests *return* home in the evening, and the groom – in the morning. The scheme of the engagement ceremony looks as follows:

$$i+v+C(a+s)+b+ag+f+r$$

Let us consider another rite of transition from the wedding cycle, called “komora” (Chubynskij, 1877, pp. 434–455). It does not have an episode of *invitation*, since the bride with her friends and the groom with their friends had already invited the villagers to the wedding on the eve of this rite. Therefore, the invitation took place and it must be noted. The guests responded in the same way and came, in this particular case – to the house of the groom’s parents. In addition to the guests, the groom pays for the bride and comes back to his house with the bride. All this is the *visit* of the participants of the ceremony to the place of its holding. The parents *bless* the newlyweds. The couple is led to the komora (a pantry) – these are certain old agreements that cannot be violated under any circumstances. The act of defloration is an episode of *the Culmination of the transition* (*C*), because after this the newlyweds are already considered a husband and a wife. Presenting proof of chastity – *creating a ritual attribute* (*a*). With the attribute and under the guidance of a friend, the husband’s guests go to the wife’s parents and walk around the table three times, showing respect or disrespect for the father and mother depending on whether their daughter turned out to be chaste or not – *honouring the sacred* (*s*). The parents treat the guests to some foog – *a feast* (*f*). Schematically, the rite can be described as follows:

i+v+b+ag+C+a+s+f+r

As for the rituals of the wedding cycle, they are quite similar in terms of the nature of the action in episodes with other family rituals. The rite of departure of the soul or death (Chubynskij, 1877, pp. 698–699) from the funeral cycle begins with *agreements*, when a dying person, feeling the approach of death, informs his family about it. In this way, he agrees that the family members will do everything as it should be. And indeed, they invite a priest, relatives, neighbours, women – *an invitation (i)*. The invited people gather at the dying manor – *a visit (v)*. The dying person is given a trumpet in his hands, and the others present – simple candles (*creating a ritual attribute (a)*). The priest performs the sacrament of communion of the dying person – this episode is both *a veneration of the sacred (s)* and *a blessing (b)*. The person over whom the ritual is performed dies, i.e., changes his status from dying to dead – *the Culmination of the transition (C)*. After the ceremony, its participants return to their own homes – *a return (r)*. Schematically, the ceremony of the soul’s departure looks like this:

(ag)+i+v+a+s(b)+C+r

“Home funeral” is a conventional name for a rite that is held on the day of the burial and ends with the villagers escorting the deceased to the cemetery (Chubynskij, 1877, pp. 706–709). *The invitation (i)* took place the day before, when relatives turned to the priest, cooks, carpenters, and diggers. Other villagers were invited immediately after the death, when the groom rang the bell for the soul of the deceased. For invitations, such a time frame is quite acceptable. The invitees gather to make a coffin, to prepare dinner, to dig a hole in the cemetery; other attendees appear later, but all of this is a visit. The priest conducts a “great” service near the body of the deceased – *honouring the sacred (s)*. Close relatives place the body in the coffin and carry it out of the house – *creating a ritual attribute (a)*. Before the coffin is taken out, it is knocked on the threshold or doorposts, the house is strewn with rye, the deceased’s bed is taken out to the yard, and an axe is placed in its place – all these are *arrangements (ar)*. A towel and bread and salt are placed on the lid of the coffin – *a blessing (b)*. The villagers accompany the body of the deceased to the cemetery – *the climax (c)*. Along the way, an elderly woman distributes cakes and bagels to those present – *a feast (f)*. *The return (r)* should take place when the participants from the cemetery come to the estate of the buried person for a memorial dinner, which is why *the return* is included in brackets in the diagram. The scheme looks like this:

i+v+s+a+ar+b+c+f+(r)

The next rite is burial in the cemetery (Chubynskij, 1877, pp. 709–710). The *invitation (i)* has already taken place earlier, so we mark it at the beginning. We mark *the arrival* from the house to the cemetery as (*ar*). The priest conducts a “small” service near the dug pit – *veneration of the sacred (s)*. After the farewell, the towel and bread and salt are given to the church priest – *a blessing (b)*. The diggers hammer in the coffin and lower it into the pit on rolls of cloth – *the creation of a ritual attribute (a)*. There are no clearly expressed *agreements (ag)*, but if desired, they can be found in the farewell to the deceased, and in throwing three handfuls of earth into the pit. The priest “seals” the grave – this action is *the culmination (c)*, moreover – *the Culmination of the transition (C)*, since after this the deceased changes status to the buried. The participants of the ceremony return to the estate of the buried for a memorial dinner – *the return (r)*. *The feast* should take place after *the return*, so we take it in brackets. The scheme of the ceremony is the following:

i+ar+s+b+ag+a+C+r+(f)

The last rite from the funeral cycle that we will analyze is the memorial dinner (Chubynskij, 1877, p. 710). *Invitation* to dinner takes place at the cemetery after the burial. As noted, such a time period is quite acceptable for invitations. *A visit* to dinner is the return of the invited participants of the ceremony to the estate of the buried person. They wash their hands outside the yard so that the smell of earth from the cemetery does not get into the yard and into the house – *an agreement*. In addition to traditional dishes on the memorial table – kutia or kanu. The preparation of such food is the creation of a ritual attribute, and the use of three spoons before dinner is a way of *honouring the sacred*. The priest says a prayer, *blessing* the dishes. *The feast* is held by eating food and raising a glass of horilka to the participants of the memorial dinner by a representative of the deceased's relatives. *The Culmination of the transition* should be marked by the arrival of the elders, who are being hosted outside. But these are not simple feasts, since the arrival of the elders is nothing more than another change in the status of the deceased from buried to deceased. After the memorial dinner, the participants in the ceremony go home – *a return*. Schematically, the memorial dinner is depicted as follows:

i+v+ag+a+s+b+f+C+r

Let us also consider the cycle of birth rituals and begin with childbirth (Chubynskij, 1877, pp. 2–6). A pregnant woman sends for a baba (a midwife) – *an invitation*. The midwife comes to the house of the future mother in labour – *a visit*. The midwife bows 30 times, reads a prayer, washes the pregnant woman, gives her holy water to drink, fumigates her with a potion, and places a bottle of borshch on the window – all this is *a veneration of the sacred*. We can also assume that the actions of the midwife include *a blessing* for the pregnant woman to give birth to a baby (Serdiuk, 2021, pp. 28–29). *The culmination of the transition* is the birth of a child, after which the woman receives the status of a woman in labour, the baba – a midwife, and the baby becomes a born one. Tying the navel and cutting the umbilical cord, wrapping the baby in a shroud, the first baptism and drying are nothing more than *the creation of a ritual attribute*. The fact that the afterbirth is buried on the border and the water is poured out after the baptism of the mother and child should be considered as *agreements* between representatives of reality and the afterlife. The descriptions of the birth rite say nothing about the midwife's *visit* and her *return* home, but these episodes must also be present. As a result, we get the following scheme:

i+v+s+b+C+a+ag+f+r

And the last rite of this cycle is the christening (Chubynskij, 1877, pp. 8–13), which is supposed to finally put everything in its place. The father *invites* fellow villagers to be godparents. The fellow villagers agree and *visit* the newborn's homestead. They present the baby with bread, bagels, and a sacrum – *blessing*. The midwife bathes the baby, wraps it in a shirt, and prepares a knot for the unclean – *creating an attribute*. The future godfather throws the knot over his shoulder at the crossroads: "You, the devil, here is the fee!" – *agreements*. *The Culmination of the transition* is the episode where the priest performs the sacrament of baptism, after which the baby acquires the status of a full-fledged child. After returning from the church, the midwife swaddles the child and puts it in the cradle – *honouring the sacred*. Traditional *feasts* and the *return* of participants and guests – should also be:

i+v+b+a+ag+C+s+f+r

Conclusion. Unlike dramatic action, for which all elements of the composition are important, ritual action is completely satisfied only with the climax. At the same time, for

the ritual, it is the climax episode that is original and unique. All other episodes into which the ritual action is divided are auxiliary and they are combined into seven groups according to the nature of the action: 1) invitations (i), 2) visits (v) and returns (r), 3) creation of a ritual attribute (a), 4) agreements (ag), 5) veneration of sacred actions, elements, objects (s), 6) blessings and gifts (b), 7) feasts and festivities (f).

Having examined in detail and compared nine family rituals from the wedding, funeral, and childbirth cycles, we obtained enough schemes to determine a universal ritual structure that would be acceptable for most traditional ritual actions:

$$i+v+[s+a+ag+b+C(c)+ff+r$$

It should be noted that the ritual, at least a family one, always begins with invitations and the arrival of the participants to the place of its holding. It ends with the return to their own homes. The other six elements, such as honouring the sacred, creating a ritual attribute, agreements, blessings, feasting, and culmination, may change their order and location, but they are, in most cases, present in each specific ritual.

If we apply the same procedure to other rituals that make up the three mentioned family cycles, we will obtain, if not the same, then very close results. And this once again proves the right to the existence of a universal ritual structure determined as a result of this study.

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Roman HOLYK

PhD hab. (History), Senior Researcher, Ivan Krypiakevych Institute of Ukrainian Studies, National Academy of Sciences of Ukraine, 4 Kozelnyska Street, Lviv, Ukraine, postal code 79026 (roman_holyk70@ukr.net)

ORCID: 0000-0003-3123-1920

Researcher ID : ADZ-9458-2022

Scopus-Author ID: 56205287000

Pavlo VASYLIV

PhD hab. (Theology), Associate Professor of the Department of Theology, Faculty of Theology and Humanities, Research Fellow of the Research Institute of Canon Law and Theological Sciences, Ivano-Frankivsk Academy of John Chrysostom, 22 Garbarska Street, Ivano-Frankivsk, Ukraine, postal code 76019 (vasylivp@ifai.edu.ua)

ORCID: 0000-0001-6523-5570

Роман ГОЛИК

доктор історичних наук, старший науковий співробітник, Інститут українознавства ім. І. Крип'якевича НАН України, вул. Козельницька, 4, м. Львів, Україна, індекс 79026 (roman_holyk70@ukr.net)

Павло ВАСИЛІВ

доктор наук з богослов'я, доцент кафедри богослов'я факультету богословських і гуманітарних наук, науковий співробітник Науково-дослідного інституту канонічного права і богословських наук, Івано-Франківська академія Івана Золотоустого, вул. Гарбарська, 22, м. Івано-Франківськ, Україна, індекс 76019 (vasylivp@ifai.edu.ua)

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SIGN AND MEMORY: SEMIOTIC AND HERMENEUTIC ISSUES OF HISTORICAL SCIENCES

Abstract. *The purpose of the research is analyze certain aspects of semiotics, hermeneutics, historical cognition and historical memory, the role of the philological and philosophical models in the interpretation of history based on the historiographic sources. The methodology of the research is based on a complex of general scientific (analysis and synthesis, induction and deduction) and special (historical typological, historical systemic, retrospective) methods of scientific research applied to the historiographic texts. Conclusions.* *There is a semiotic hermeneutic structure in the study on history and historical narration. It appears as a kind of hermeneutic circle from the old understanding explanation to the new understanding explanation or a semiotic chain from the old sign (statement) to the new statement as a sign. The sign system of thinking recorded in symbols shapes human memory, limits and expands it. The signs and*

meanings fill the content / semantic dimension / space of memory, and record in it facts, events and things of the historical reality. Due to semantics / understanding of events / facts / things, it is possible to classify them in human thinking, place them in synchronic and diachronic series, and with their help (after verification) to create and interpret historical discourse/narrative. The historical discourse becomes an object of individual and collective memory, which signifies, records, and then rewrites, redefines it, as historical reality changes. The historical sciences also include the concepts of ethnology, linguistics, and cultural studies. A historian is a conscious or unconscious semiotician, since he/she expands. History is a text, discourse, sign, message created by a human being in the past, which is read and interpreted by a present human being. Historiography is a dialogue, a set of communicative / speech acts between an addresser and the addressee, who are in different time dimensions and circumstances. A sign makes individual and collective memory long-lasting, historicizes it. Memory adds a historical dimension to signs. The historical memory and historical science are considered to be: 1) semiotic acts of formulating, coding and decoding messages; 2) hermeneutic acts of understanding and interpreting messages. A sign becomes memory, and memory becomes a sign in order to become history, its signification / definition and understanding. At the same time, they are projected onto the existence of individuals and societies that seek the meaning of events and shape history.

Key words: history, memory, historiography, philosophy of history, sign, meaning, semiotics, hermeneutics, Ukraine, world, cultural studies.

ЗНАК І ПАМ'ЯТЬ: СЕМІОТИЧНІ ТА ГЕРМЕНЕВТИЧНІ ПРОБЛЕМИ ІСТОРИЧНИХ НАУК

Анотація. Мета роботи На підставі історіографічних джерел дослідити окремі аспекти семіотики, герменевтики, історичного пізнання та історичної пам'яті, роль філологічних та філософських моделей в інтерпретації історії. **Методологія дослідження.** При написанні статті використано комплекс загальнонаукових (аналіз та синтез, індукція та дедукція) і спеціальних (історико-типологічний, історико-системний, ретроспективний) методів наукового дослідження, застосованих до історіографічних текстів. **Висновки.** Дослідження історії та історична нарація має семіотико-герменевтичну будову. Вона виявляється своєрідним герменевтичним колом від старого розуміння – пояснення до нового розуміння-пояснення або ж семіотичним ланцюжком від старого знаку (твердження) до нового твердження як знаку. Зафіксована у символах знакова система мислення формує людську пам'ять, обмежуючи і розширюючи її. Знаки і значення заповнюють зміст / семантичний вимір / простір пам'яті, і фіксують в ній факти, події і речі історичної дійсності. Семантика / розуміння подій / фактів / речей, класифікує їх у людському мисленні, ставить у синхронічні та діахронічні ряди, а з їхньою допомогою (після верифікації) творить та інтерпретує історичний дискурс / наратив. Історичний дискурс стає об'єктом індивідуальної й колективної пам'яті, яка його означає, записує, а потім переписує, переозначає, в міру того, як змінюється історична реальність. історичних наук потрапляють також концепції етнології, мовознавства, культурологія Історик є свідомим чи неусвідомленим семіотиком. Історія є текстом, дискурсом, знаком, повідомленням, створеним людиною в минулому, яке відчитує, інтерпретує нинішня людина. Історіографія – це діалог, сукупність комунікативних / мовленнєвих актів між адресантом і адресатом, які перебувають у різних часових вимірах та обставинах. Знак робить індивідуальну та колективну пам'ять тривалою, історизує її. Пам'ять додає знакам історичного виміру. Історична пам'ять та історична наука є: 1) семіотичними актами формулювання, упакування і розпаковування повідомлень; 2) герменевтичними актами розуміння та витлумачення повідомлень, Знак стає пам'яттю, а пам'ять – знаком, щоб стати історією, її сигніфікацією / означенням і розумінням. Водночас вони спроектовані на екзистенцію індивідів та соціумів, які шукають сенс подій і формують історію.

Ключові слова: історія, пам'ять, історіографія, філософія історії, знак, значення, семіотика, герменевтика, Україна, світ, культурологія.

Problem Statement. The issue on the historical thinking and the role of sign systems in its formation and development is one of the fundamental issues on historiography,

philology, cultural studies, philosophy of science and culture. Thinking of a historian is a multidimensional phenomenon, which reflects various aspects of the Humanities. It develops in the direction of the historiographic scientific paradigms. However, the historical discourse is a consequence of the development of language, sign structures necessary for its expression (writing systems) and the structures expressed in it (concepts of worldview, style of thinking, ideas and stereotypes). Historiography depends on the methods of interpreting signs and discourses of the past. Hence, the historical narratives can and should be considered not only as stages of development of (historical) science, but as facts of the historical process itself, and as texts, semiotic and hermeneutic constructs. They are closely related to the issue on the individual and collective memory, which is also a product of semiotics and hermeneutics.

Review of Sources and Recent Research. There are diverse studies on semiotics (the general theory of signs and meanings) and hermeneutics (theories of interpretation, interpretation, etc.), which are among the leading in the Humanities. There were published numerous semiotic studies, which gain popularity, by Umberto Eco (Eco, 1976; Eco, 1986; Eco, 1989), John Deely (Deely, 2005), Tomas Sebeok (Sebeok, 1991; Sebeok, 2001), Roland Barthes (Barthes, 1974; Barthes, 1977; Barthes, 2012) and their followers (Cobley, 2005), as well as the works on religious (Terry, 1885) and philosophical hermeneutics of Hans Georg Gadamer (Gadamer, 1976; Gadamer, 1996), Paul Ricoeur (Ricoeur, 1965), their critics and interpreters (Bayón, 2006). The studies, which were written by Jan and Aleida Assmann (Assmann, 1995; Assmann, 2011; Assmann 2011), Paul Connerton (Connerton, 1989), and Pierre Nora (Nora, 1989), are also relevant in historical and cultural memory. The connections between semiotics/semiology, hermeneutics and historical sciences were partially studied in the field of hermeneutics of the historical process (Ricoeur, 1965), semiotic systems of historiography (Carrard, 1992), semiotics of history, and archaeology (Tamm, 2017; Tamm, & Preucel 2022). In contrast, the methodological issues on historiography and philosophy of history were studied much less in Ukraine (Zashkilniak, 1996; Zashkilniak, 1999), and the semiotic and hermeneutic aspects of these studies were covered in works on the theory of hermeneutics (Kvit, 2003; Ivanyshyn, & Markova, 2025), methodology of historical sciences (Haliv, & Ilnytskyi, 2021; Ilnytskyi, & Haliv, 2022; Haliv, & Ilnytskyi, 2023), history of historiography (Lazurko, & Dikhtievskyi, 2021), history of mentality (Stetsyk, & Vasylyv, 2025), ethnology (Artymyshyn, & Holyk 2021), culture and literature (Holyk, 2001; Holyk, 2006; Holyk, 2019), and Ukrainian historical discourse (Yas, 2014). There is still scarcity of works in historiography, which demonstrate the connection between the historical research, semiotics, and hermeneutics in the context of collective memory.

The purpose of the research is to present the results of the study, based on historiographic sources, certain aspects of semiotics, hermeneutics, historical cognition and historical memory, the role of philological and philosophical models in the interpretation of history.

Research Results. W. James described memory as a direction into the depths of the past, “a general feeling of the past direction in time,” one of the main elements of which is “a particular date (...) defined by its name or phenomenal contents” (James 1920, p. 288). This definition of memory was semiotic historical and consisted of two parts: actual memorization and recollection. At the same time, F. C. Bartlett depicted these processes not as the reproduction of “frozen data,” but as a constructive/reconstructive process of a person’s attitude to the entire mass of past experience (Bartlett 1995). Memorisation and recollection include naming, signification, definition of the past, and elements of its understanding. Memory is divided into individual subjective and objectified, collective,

which in turn contains communicative memory in the signs of oral tradition and cultural memory in written signs (Assmann, 1995; Assmann, 2011; Assmann 2011; Connerton, 1989; Nora, 1989). Knowledge of the distant past is transmitted through the “distant” collective written memory; individual memory becomes the key to understanding the recent past, and, in particular, a historical understanding of time arises (Whitrow, 1982). Semiotics and the hermeneutics of history are based on the above-mentioned principles.

Historiography, from a semiotic and hermeneutic point of view, is a product of written culture and of a remote, written cultural memory. It is based on the synthesis and analysis of a “close” communicative memory of individuals. Historiography can be analyzed as a variety/genre of literary writing (White, 1973), as a variety of oral and written discourses (Van Dijk, 1997) as a set of communicative acts (Searle, 1969) and as a critical analysis/interpretation of these acts, genres, discourses (Van Dijk, 2001). Speaking semiotically and hermeneutically, historical science, like any science, is a set of contemporary texts about the past, which are interpretations of texts of the past (which, in turn, are signs of past events and phenomena). Both are generated by certain languages according to the literary canons of the specific written cultures. That’s how the hermeneutics and semiotics of history intersect/meet with linguistic and literary semiotics and hermeneutics. As an expression of cultural memory, historiography is the interaction and opposition of a scientific, academic and artistic, “literary” writing. The ordinary conversation about history, from which it developed, is part of communicative memory, in which elaborated and neo-prodiscursive genres also cross (Bernstein, 1971). Written and oral history are considered to be the forms of the culture of memory. Oral history is created by a person, who speaks, written history is formed by a person, who writes: an author, a scholar, a writer. There were often combined the roles of a narrator, a scholar and a writer at certain stages, and folklore narrative, mythohistory and literature appeared at the same time as proto-science, and vice versa (Lord, 1971).

It is demonstrated by the history of European historiography (Breisach, 1994; Kelley, 1998). History as “the research” by Herodotus, Thucydides, Xenophon, Plutarch or Titus Livius, Suetonius and Sallust Crispus. Hence, ancient mythography as the transition from the mythology of Homer and Hesiod to quasi-historical and historical plots to the written history of Herodotus or Thucydides and later historiography. In this historiography, the discourse of research merged or almost merged with the texts of the sources. Hence the names of these texts: from the “Histories” “Ἱστορίαι” of Herodotus to the Anabasis” “Ἀνάβασις” “Retreat of the Ten Thousand” of Xenophon. At the same time, these mixed texts of the Greco-Roman historical writing formed the “semantic field” of the world historiographic tradition as “the conceptualization of history in the Herodotus-Thucydides sense” (Kelley, 1998, p. 5)

It should be mentioned that medieval historiography, from Eusebius to the Eastern European authors of “Povist Vremennykh Lit” (the Tale of Bygone Years) or the Galician-Volyn Chronicle, was also partly a literary narrative based on the church and secular authorities and models. At the same time, it became an attempt to make the events of earthly history symbols and allegories (signs) of sacred history. The above-mentioned tradition was partly continued in the historiography of the Renaissance, Baroque, and Enlightenment. The historiography of Romanism had features of the romantic literary historiosophy. The bifurcation of writing and style into History and Literature emerged, mainly, in the middle of the 19th century together with positivism as a method of science (on the one hand) and the image of literature as an artistic depiction of the reality (on the other). There emerged the current idea of a written source and archive as a place of accumulation and research of written culture. But

the historiography of the positivist era not only embodied the principles of Auguste Comte, but also adhered to the narrative strategies of literary positivism (White, 1973). Therefore, on the one hand, it separated the metalanguage of science from the language of sources and the language of the artistic literary tradition, and on the other, like the historiography of past eras, it built a literary myth on top of the positivist discourse, making it, according to the Barthes scheme, a sign of this myth (Barthes, 2012). Hence, there was the rise of the social and mental opposition between different types of the authors and interpreters of texts: 1) an “ordinary” person, who writes and explains historical events at the level of the Barthes “zero, everyday level of writing”, 2) a writer, who describes and interprets history from the perspective of metaphorical, figurative speech, 3) a scholar historian, whose interpretations are studies, and the texts are scientific treatises (Barthes, 1977). Historiography and literature are different types of writing, but they constantly cross.

Even the historians, who use completely quantitative and descriptive methods, do not explain the historical events exclusively in the language of exact and natural sciences. A historiographer, for the most part, does not interpret facts with the help of mathematical symbols (Bloch, 1964), but uses only the natural language. Many of its elements are also vague and unacceptable from the point of view of the exact sciences. The objective structures and conjunctures of history are only “a plan of expression” of the consciousness and mentality of people, the main figures of historical process. Hence, some historians write and conduct a research through the prism of “taking” the Other into the world as a being both close and distant at the same time (Marrou, 1954). Historiography is “a struggle of metaphors”, which can contain not only objective judgments but also hidden irony and satire, from the rhetoric and stylistics perspective. Historians’ texts were built, based on the form, according to the archetype/metaphoric model of the Novel, Comedy, Tragedy, with the help of Synecdoche and Irony, Metaphor and Metonymy. The texts, based on the content, embodied the discursive techniques of Mechanism and Contextualism, Formism and Organicism, the ideologues of Anarchism and Liberalism, Radicalism and Conservatism (White, 1973). At the beginning of the 20th century, an example of the “artisticization” of historical thought was Johann Huizinga’s “Autumn of the Middle Ages”, where the historical process is a colourful picture of ideas and figurative forms of thinking. The paintings by Wein Eyck brothers were the role model for Huizinga, hence, his texts were filled with contrasts and semi-contrasts of the past, which the author declared right from the first pages of the book: “Calamities and indigence were more afflicting than at present; it was more difficult to guard against them, and to find solace. Illness and health presented a more striking contrast; the cold and darkness of winter were more real evils. Honours and riches were relished with greater avidity and contrasted more vividly with surrounding misery. We, at the present day, can hardly understand the keenness with which a fur coat, a good fire on the hearth, a soft bed, a glass of wine, were formerly enjoyed” (Huizinga, 1922, p. 9). Such kind of approach was criticized for being too artistic. However, at the end of the 20th century, the French authors followed similar principles, who addressed microhistory of everyday life and history of emotions. The works of the “new history” representatives, even with their “rituals of quantification,” obeyed the principles of literary poetics (Carrard, 1992), and were also directed to imagination and emotions (Burke, 1991). The numbers and schemes are not only the signs of economics and statistics in the works published by Fernand Braudel, but also signifiers of everyday ideas and people’s lives (Braudel, 1985). The supporters of this trend were not, and are not, the structural semioticians or hermeneuticians, but their approach contains elements of both.

Hence, the titles of historical works of the second half of the 20th century, which carry a touch of the literary imagery: “Man in the Face of Death” by Philippe Aries and “Death in the West” by Michel Vavel, “The City under Siege: Fear in the Medieval West” by Jean Delumeau” or simply “The Medieval Imagination”, “The Birth of Purgatory” (Le Goff, 1984; Le Goff, 1988) by Jacques Le Goff or Georges Duby’s “Time of Councils”, etc. The object of study of many of these researches is semiotic systems, for example, gestures and greetings as signs of history in “Monteil” by E. Leroy-Ladurie. It was also evidenced by the final formulas of the book about Montaignou: “Montaignou itself is much more than a courageous but fleeting deviation. It is the factual history of ordinary people. It is Pierre and Beatrice and their love; it is Pierre Maury and his flock; it is the breath of life restored through a repressive Latin register that is a monument of Occitan literature. Montaignou is a physical warmth of the ostal, together with the ever-recurring promise of a peasant heaven. The one within the other, the one supporting the other” (Le Roy Ladurie, 1978, p. 356). There were also found similar attributes in the reconstructive “The Return of Martin Guerra” by Natalie Z. Davis (Davis, 1983). It was partly due to the made attempts in order to understand and revive the past, and partly to the need for the dialogue between historians and readers of their research. According to E. Breisach, different types of history have different popularity depending on how skillfully historical narrative affects imagination. The scientific history has a limited circle of readers; as a political narrative it attracts more resonance, but the greatest resonance is received by “dramatic history” (or history as drama) like Homer’s Iliad and Odyssey (Breisach, 1994, pp. 3, 33). Semiotically speaking, a historian must choose an appropriate discursive or literary genre to remain in touch with the reading public. The combination of historical and artistic forms of expression reflects the specificity of historical thinking, oriented both to the fact and to its meaning and forms of expression. The key here is perhaps Ingarden’s concept of concretisation of a literary work, which partially extends to the historiographical text: in the imagination of the author and the reader, events and characters are transformed from written signs into concrete pictures and images. In this case, the historical text can be accepted as a literary work of art (Ingarden, 1973).

The hermeneutic component of historiography is represented by the historiosophical tradition, for example, of the medieval historians. They interpreted history as realization of biblical prophecies and their own theological schemes (like St. Augustine with his division into “life before the law” – the fall – “life under the law” – the Last Judgment – “life “in the glory of God”, etc.). The modern schemes of Arnold Toynbee, who read history through the prism of “challenge and response, “Departure and Return”, “disintegration and polygenesis”, or Teilhard de Chardin, who saw in it the transition from the Alpha point to the Omega point should also be mentioned in this context (Toynbee, 1972; Teilhard de Chardin, 1961). In such systems, history is a continuum of signs that have a certain genesis, meaning and purpose, as in the theory of Karl Jaspers (Jaspers 1953), or an idea that drives events and contributes to their understanding, as in the concept of R. Collingwood (Collingwood, 1946.). In general, this is an approach to the world as a Book that can be read, and in which Memory / Memoria and History are a kind of court over events, communities and individual actors of these events (Blumenberg, 2022). In each of these approaches, history, in essence, is transformed into a series of signs, the Text is endowed with a Super-meaning. Only Paul Ricoeur claimed that no human being can grasp or read the general meaning radiating from the different loci of History (Ricoeur, 1965, p. 39). However, even behind these Ricoeurian meanings, one can see glimpses of the “written textual” interpretation of the historical events.

There is also an issue regarding the understanding the signs of time, the signs of history. Some authors see here a certain dialogue (question – answer) between a historian and a person / society of the past through the mediation of texts. At the same time, according to R. Collingwood (Collingwood, 1946) a historian's question must be “reasonable”, have some logical and factual basis. The question is answered by a sentence, which, in turn, must be a “correct”, adequate answer to a question. Hence, a coordinated complex of a question and an answer arises, within which a “true” interpretation of events is emerged. Often, a historian asks himself a question in order to recreate in his thinking the train of thought of another person who lived in the past. This means that there is already the part of an answer / interpretation in a historian's question. In other terms and concepts, the historical hermeneutics is considered as a deviation from causal explanation (where the event-cause and the event-effect are related as explanans and esplanandum). A historian, unlike the representatives of the exact sciences, does not ask the question “Why is this necessary?”, but “How is this possible?”, or is generally outside the coordinates of the usual cause-and-effect relationship (Von Wright, 1977). In the context of the history of wars, the destruction of cities and villages for the historical analysis is not a sign of an action of physical forces, man-made or natural cataclysms, but manifestation of a human aggression and military technologies (therefore, a sign of influence of political, economic, emotional structures).

The traditional historiography supporters (Langlois, & Seignobos, 1932; Chabod, 1973) focused on the “signs” that a historian and archeographer should be guided by: the type of material on which the document is written, paleographic indicators, formulas and dating systems used, the style (dictionary, syntax) of the document, its content, etc. It helps attribute the writing to a certain era and distinguish the original from a copy or a forgery (Nickell, 1996), real signs of history from false simulacra, illusions, and dummies of the past, such as the so-called “the Forged Dvůr Králové” and “Zelená Hora Manuscripts”, “slavic runes”, The Book of Veles (also called the Veles Book, Vles book, Vlesbook) or Isenbeck's Plank, James Macpherson's poems of Ossian, “pre-Columbian Mexican crystal skulls” and “The Codex Moguntiacus” or “Black Stones of Ica”. The above-mentioned approach is sometimes applied to such phenomena as The Światowid from Zbrucz River/ Zbruch idol or even to “Slovo o Polky Ihorevim” (The Tale of Ihor's Campaign) (Keenan, 2003). At the same time, in the cultural and historical memory, identifiable signs or sign complexes that are “uncertain” for the historian still remain, such as “The Voynich manuscript”, “The Phaistos Disk”, part of the Etruscan inscriptions or the Indus (Harappa) Script, the Cretan Linear A script, etc. A historian should not trust the signs of everyday life, but in moderation, so as not to create an overinterpretation (Eco, Culler, & Brooke-Rose, 1992), when, as in the novel by W. Eco, an ordinary laundry list will seem like a secret key to the Templar treasures (Eco, 1989).

The role of a semiotic and hermeneutic factor is growing in modern historiography. The “semiotic archaeology” (Gardin, 1980) is a vivid example of the above-mentioned. The archaeologist draws attention to the features that distinguish the objects of the material culture (the material and form of objects, as well as inscriptions, scenes, ornaments) in this context. There are built the “Compilations” (statements, verbal and visual signs for fixing, ordering, identifying the basic features of objects) and the “Explications” (theories that explain, interpret objects) on this basis. At the same time, as in hermeneutic concepts, the archaeologist, like the historian, relies on subjective prejudices, past experience in order to understand and then comment on the thing as a text.

Michel Foucault, the author of “mental archaeology”, when he studied or excavated the historical discourse, emphasized the differences between the traditional, past and contemporary history. According to the author, the traditional history transformed the monument into a document. On the contrary, the past history transformed the “document into a monument”, and history itself into memory. The philosopher insisted on the semiotization and systematization of the past. History, he believed, should “embroider” the fabric of the document, searching for aggregates, sequences and connections in it, and traces that need to be grouped (Foucault, 2002). According to Foucault’s interpretation, the past became both structure and philosophical metaphor. Hence, there emerged the studies on the history of madness and psychiatry (Foucault, 1965), criminal offenses (Foucault, 1975), the clinic and medical thought (Foucault, 1976), corporeality (Foucault, 1978–1986), the idea of prison and imprisonment (Foucault 1977), the history of the history of science itself as a change of words and things (Foucault, 1971).

Semiotics and hermeneutics were always important for those, who did not apply the postmodern approaches: for the historians of heraldry with its set of the visual symbols (the center of the shield, the right/left field of the coat of arms, its top and bottom, mottos), which require an interpreter hermeneutic; for the chronology scholars (whose signs are various dating systems, the names of days, months, religious holidays to which these dates are tied, etc.), numismatics (with its reading of the obverse and reverse of coins,) for the paleographers (for whom the main thing is the graphics of written signs). The historical genealogy and its will also be as a semiotic system of schemes and signs (reflecting birth, marriage, death of individuals).

The interest in semiology and hermeneutics is a consequence of the semiotic hermeneutic turn or mini-revolution in historiographic paradigms (Kuhn, 1996). From the point of view of semiotic and hermeneutic paradigms, historiography and historical sciences have several guides or analogies. The first of the paradigms: history in the light of the history of language and linguistic memory as the main modeling semiotic system. Language and linguistic memory can be described both in synchrony (in one time frame) and in diachrony (from the point of view of the historical changes in time). There are several universal mechanisms of changes in linguistic signs in diachrony (Campbell, 1999), for example: assimilation and dissimilation (similarity and differentiation of phonemes), prosthesis (the appearance of adjunct sounds) and metathesis, sounds in phonetics, analogy (when word forms are “adjusted” to a certain existing pattern in the language) in morphology; the external borrowings and the internal semantic changes (metaphor, metonymy, synecdoche) in vocabulary and phraseology, etc. In social coordinates languages can be divided into languages – the substrates and superstates, languages, argots and dialects, pure and creolized languages, etc. theoretically. Language systems move towards a more accurate and perfect expression of the realities and ideas of the societies in which they develop. Current histories of language exist in two versions: as the so-called historical grammars, which consider only the internal structure of languages, and as histories of literary languages, which consider the external historical and social background of languages through the prism of their written monuments. It is the latter that are closer to the historical discourse and use its language.

The second paradigm: history in the light of literary history as a secondary semiotic system from which historiography once developed. The history of literature is a change in systems and styles that correspond to certain periods of the development of art. There are diverse schemes for the development of literature. The literary process in diachrony is

sometimes interpreted as a change from primitive mythologism (antiquity), idealism (the Middle Ages) to realistic writing (modern times), separating the idealistic and realistic naturalistic lines of literature, etc. Dmytro Čyzevs'kyj's scheme (Čyzevs'kyj, 1997), is well known. According to the scholar, he saw in the history of literature periods of complication and simplification of the stylistics of the text: monumentalism – ornamentalism – reformation literature – baroque – classicism – romanticism – realism, etc. Instead, in “New History of French Literature” edited by Denis Hollier (Hollier, 1989), literary history is tied not to styles as signs of an era, but to the chronology of dates and historical events, on the one hand, to certain literary genres, images, concepts, trends, events in artistic life. In the case of such a literary history, the historical (as an “external” phenomenon) becomes a representative of the literary (“internal”). Some theorists question the existence of the traditional history of literature itself as an illustration of progress or simply the evolution of the canon of the literary thought (Perkins, 1993). Some authors believe that literary history should be tied to social history, others defend the autonomy of both these spheres. In general, the History of Literature is history, but a Different History, just as a literary work can be a historical document, but a Different, specific document. However, for the historians, the history of language and literature constitutes a “plan of expression”, an external form in which historical content is dressed.

History, linguistics and literary studies do not deal with the abstractions, but with society, differentiated according to the ethnocultural principle, which is studied by the historical/social/cultural anthropology or ethnology. The historical ethnological line of semiotics can be considered in several planes. An example was the ethnography of Claude Lévi-Strauss, who wrote in scientific form (“The Structural Anthropology”) and the artistic form (“The Sadness of the Tropics”) at the same time. His thinking often moved between the languages and cultures (the English and French versions of the works). There were also reflected imagery and scientificity in the titles of K. Lévi-Strauss's works (“The Way of the Masks”, “Raw and Cooked”, “Honey and Ashes”), which combine the desire for the mathematical accuracy (“formulas of mediation”) and the artistic descriptiveness in the retelling of myths and rituals. Numerous scholars called for the analysis of a specific ethnographic discourse, ethnological writing (or even “ethnographic fictions” as “true fictions”). Social/cultural anthropology is seen as a discipline born from the dialogue between the representatives of the written culture and bearers of the oral culture. In this case, the texts of ethnologists (authors) are (re-)interpretations of the texts of their field counterparts (respondents), and anthropologists themselves appear as “unmaskers” and “decoders” of oral messages in the language of written culture, mediators between civilizational worlds (Clifford, & Marcus, 1986).

In general, the study on history, historical narrative has a semiotic hermeneutic structure. It turned out to be a kind of hermeneutic circle from the old understanding – explanation to the new understanding explanation (Gadamer 1976; Gadamer 1996) or a semiotic chain from the old sign (statement) to the new statement as a sign: Sign – meaning – interpretation – meaning – sign. In other words, it is about redefining history on the basis of sources. The historian's scientific statement is a space of signs and meanings: subjects, objects / actants (the author and his characters), predicates (their actions, attributes), circumstances – circumstantial (which form the “scene” of the statement) like an ordinary sentence (Tesnière, 2015). Historical narrative is based on certain narrative schemes (“steps”, plot moves, motifs, etc.). The historian's discourse has a semantic, syntactic, and pragmatic dimension, like every semiotic hermeneutic unit: its signs are endowed with meanings and

senses, connected in a communicative chain that unfolds in a certain socio-historical context (which is surrounded by conceptual frameworks/frames) (Van Dijk, 1997).

From the point of view of the philosophy of language, in historiography, as in every scientific discipline, one can single out sentences/statements that are models of past worlds and reflect their configuration or state of affairs (Wittgenstein, 1922). But the meaning of these statements consists in not being within the framework of a positivist vision of the world, nor within the framework of the analysis of “atomic”/“protocol sentences”. The signs of historical narrative reflect “imprecise” knowledge of the world; the historians are aware that they cannot fully describe either memory or history: “Where of one cannot speak, there of one must be silent (Wittgenstein, 1922, p. 189). In general, history is a science “between knowledge and narrative” that exists alongside the knowledge and narratives of historians of literature and philosophy as representatives of “Other” historical sciences (Chartier, 1997, pp. 5, 13). Compared to them, it looks like “Other” literature and philosophy. Any Irene Marrou (Henry Davinson) argued that the texts of the past should be perceived only as intermediaries in “friendly communication” between modern man and his predecessors (the goal of which is to create sympathy for the object of knowledge). He called for moving from text analysis to the culture of the past, and from it to ideas about man, his thinking and the way of expressing thoughts (Marrou 1954). Hence, history is a science of existence as well as of the sign. There is a combination of Symbol, Thought and Referent in the semantic triangle by C.K. Ogden and I.A. Richards (Ogden, & Richards, 1923). From this point of view, the scientific statements of historiography are that symbolic, signified sphere where the positivist denotation/referent of analytical thinking intersects with the hermeneutic way of thinking, the phenomenology of social existence and the phenomenon of man in synchrony and diachrony.

Conclusion. The sign system (semiotics or semiology) of human thinking, fixed in external (linguistic and visual) symbols, forms and shapes human memory, limiting it and, at the same time, expanding it. Signs and meanings fill the content/semantic dimension/space of memory as a set of separate semantic fields and record in it facts, events and things of the surrounding reality as meaningful entities. Semantics/ a certain understanding of events/facts/things, classifies them in human thinking, places them in synchronic and diachronic series or sets, and with their help (after verification) creates and interprets historical discourse/narrative in the memory of people and societies. Hence, discourse becomes an object of individual and collective memory, which nominates, signifies, records it, and then rewrites, re-denotes, transcribes it as historical reality changes. That is why, the historical sciences also include concepts from other disciplines: ethnology, linguistics, and cultural studies. A historian is a conscious or unconscious semiotician, since he/she is an extension of the historical sciences. Therefore, individual moments of historical analysis are both analogue of the analysis of everyday speech and way of thinking, and a structuralist analysis of signs, meanings, and concepts, and a sociological and existential understanding of man as the main object and subject of history. Taking into consideration the above-mentioned, history is a text, discourse, sign, message created by a human being in the past, which is read and interpreted by a human being today. Historiography in such a reading is a dialogue, a set of communicative / speech acts between the addressor and the addressee, who are (mostly) in different time dimensions and circumstances. The sign makes individual and collective memory durable, places it in a historical context, and vice versa, memory (especially collective), using signs, creates history as a discourse/text/narrative, and adds a historical dimension to signs. Memory often depends

on stereotypes and myths, prejudices expressed in linguistic signs. The historical memory and historical science are considered to be: 1) semiotic acts of formulating, packaging and unpacking messages; 2) hermeneutic acts of understanding and interpreting messages. A sign becomes memory, and memory becomes a sign in order to become history, its signification/definition and understanding. Historiographic discourse and memory are projected onto the existence and life of individuals and societies that seek the meaning of events and shape history.

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Yuliia SYTNYK

PhD (History), Associate Professor of the Department of Social and Humanitarian Disciplines, Uman National University, 1 Instytutaska Street, Uman, Ukraine, postal code 20305 (julysytnyk@udau.edu.ua)

ORCID: 0000-0002-7912-908X
ResearcherID: rid107863

Olexander SYTNYK

PhD hab. (History), Professor, Department of History and Archaeology, Bohdan Khmelnytskyi Melitopol State University, 59 Naukovoy Mishechka Street, Zaporizhia, Ukraine, postal code 69000 (oleksander_sytnyk@i.ua)

ORCID: 0000-0001-7743-8148
ResearcherID: E-7860-2018

Юлія СИТНИК

кандидатка історичних наук, доцентка кафедри соціальних і гуманітарних наук, Уманський національний університет, вул. Інститутська, 1, м. Умань, Україна, індекс 20305 (julysytnyk@udau.edu.ua)

Олександр СИТНИК

доктор історичних наук, професор кафедри історії та археології, Мелітопольський державний університет імені Богдана Хмельницького, вул. Наукового містечка, 59, м. Запоріжжя, Україна, індекс 69000 (oleksander_sytnyk@i.ua)

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**THE TRANSFORMATION OF RUSSIAN IMPERIAL EXPANSIONIST POLICY
(the 18th – MID-19th CENTURIES): A HISTORIOSOPHICAL REASSESSMENT
OF THE UKRAINIAN CONTEXT**

Abstract. *The purpose of the research is to reassess the transformation of the Russian imperial expansionist policy from the 18th century to the mid-19th century, with a particular focus on the historiosophical dimension within the Ukrainian context. The methodology of the research is grounded in the principles of historicism, dialectics, system analysis, and objectivity, employing both general scientific methods (such as analysis, synthesis, abstraction, generalization) and specialized historical methods (comparative historical, historical genetic, historical typological, among others). Scientific Novelty.* *There has been provided an in-depth analysis of the Russian imperial expansionism transformation during this period, for the first time in domestic historiography, while accounting for the historiosophical aspect of Ukraine's experience. Conclusions.* *There has been concluded that it is required to conduct deeper and more critical analysis regarding the transformation of the Russian*

imperial expansionist policy from the 18th to the mid-19th century, in light of contemporary realities. This particularly concerns the historiosophical aspect of the process of integrating representatives of the Ukrainian national elite into the Russian state and society. The policy of the Russian Empire in Ukraine during the latter half of the 18th to the mid-19th century underwent a significant evolution – from unification measures, generally characteristic of any empire's legal framework, to overtly discriminatory actions against the Ukrainians. These actions were driven by a chauvinistic orientation that accompanied the formation of the Russian political nation. Consequently, the Russian imperialism was inherently chauvinistic and expansionist. This made it especially aggressive toward peoples, who embodied alternative values such as democracy, republicanism, and a strong sense of freedom. In contrast to the autocratic imperial model of Russia, the Ukrainian society – rooted in the traditions of democracy and republicanism and sustained by the historical memory of the Cossack self-governance and the Cossack-Hetman state – was able to resist the Russian chauvinistic policies for a considerable time. It is no coincidence that the Ukrainian nation and its statehood became primary targets of the Russian expansionism and Russification. Furthermore, the Ukrainians were among the most active in opposing the Russian imperial policies. Therefore, there is a pressing need to challenge various Russian great-power myths about “brotherly peoples” and the so-called “civilizing mission” of the Russian Empire. The policy of the Russian imperial expansionism during this period clearly demonstrated a profound disregard for the rights of all peoples, especially the Ukrainians. Moreover, imperial policy aimed to nullify the cultural distinctions between the Ukrainians and the Russians, ultimately seeking to destroy the Ukrainian national identity.

Key words: Russian imperialism, expansionism, transformation of politics, historiosophy, identity, Cossack elders, despotism.

ТРАНСФОРМАЦІЯ ПОЛІТИКИ РОСІЙСЬКОГО ІМПЕРСЬКОГО ЕКСПАНСІОНІЗМУ (XVIII – СЕРЕДИНА XIX ст.): ІСТОРІОСОФСЬКЕ ПЕРЕОСМИСЛЕННЯ УКРАЇНСЬКОГО КОНТЕКСТУ

Анотація. Мета дослідження полягає в переосмисленні трансформації політики російського імперського експансіонізму впродовж періоду XVIII – середини XIX ст., з акцентом на історіософській складовій українського контексту. **Методологія дослідження** базується на принципах історизму, діалектики, системності, об'єктивності; при застосуванні загальнонаукових (аналізу, синтезу, абстрагування, узагальнення тощо) та спеціально-історичних (порівняльно-історичний, історико-генетичний, історико-типологічний тощо) методів. **Наукова новизна.** Поглиблено аналіз трансформації політики російського імперського експансіонізму впродовж періоду XVIII – середини XIX ст., з урахуванням історіософської складової українського контексту цього явища. **Висновки.** З'ясовано, що аналіз трансформації політики російського імперського експансіонізму впродовж XVIII – середини XIX ст., з огляду на сучасні реалії, потребує ґрунтовнішого переосмислення. Зокрема це стосується історіософської складової процесу інтеграції до Російської держави її суспільства представників української національної еліти. Політика Російської імперії в Україні впродовж другої половини XVIII – середини XIX ст. відзначалася істотною еволюцією – від уніфікаційних дій, загалом, притаманних правовій природі будь-якої імперії, до відверто дискримінаційних кроків проти українців, зумовлених шовіністичним спрямуванням, що супроводжував процес становлення політичної російської нації. Варто наголосити, що російський імперіалізм мав шовіністичний та експансіоністський характер. тому він був особливо агресивний стосовно народів, які демонстрували інші цінності: демократизм, республіканізм і волелюбність. На противагу практиці імперського самодержавства Росії, українське суспільство, сформоване на традиціях демократизму й республіканізму, завдяки історичній пам'яті про козацьке самоуправління та козацько-гетьманську державу тривалий час змогло протистояти політиці російського шовінізму. Не випадково саме українська нація та її державність опинилися під головним ударом російського експансіонізму та політики зросійщення. І саме українці чи не найактивніше протистояли російській імперській політиці. Власне з огляду на це, постає необхідність спростування низки російських великодержавних міфів щодо “братніх народів”, “цивілізаційну роль” Російської імперії тощо. Адже політика російського імперського експансіонізму впродовж

XVIII – середини XIX ст. яскраво продемонструвала повну зневагу до всіх народів, особливо – щодо українців. Водночас імперська політика була спрямована на нівелювання культурних відмінностей українців і росіян, а отже – знищення української національної ідентичності.

Ключові слова: російський імперіалізм, експансіонізм, трансформація політики, історіософія, ідентичність, козацька старшина, деспотизм.

Problem Statement. The contemporary Russo-Ukrainian War has vividly demonstrated not only the historical continuity of the Russian imperial expansionism but also the threat posed by the Kremlin regime to European stability and democracy. Simultaneously, the policy of the Russian neo-imperialism systematically continues the traditions established by its founders in the 18th century, which have consistently aimed at distorting history and deforming historical memory. Specifically, the Russian imperialism sought to nullify the Ukrainian historical thought and deprive the Ukrainians of their own identity. To this end, the imperial state apparatus employed a wide range of means to incorporate the Ukrainian elite into its orbit and eliminate the historical memory of the Cossack self-governance and the Cossack-Hetman statehood.

There is an ongoing discourse regarding the origins and evolution of the Russian imperial expansionism in contemporary Ukrainian historical scholarship. This includes the so-called “New Imperial History”. For instance, V. Gorobets in his work on this issue in January 2022, examined it within the context of the modern Russo-Ukrainian War. The scholar posed the questions: “How is the image of Ukraine changing in historical research on the Russian Empire?” and “What exactly is this ‘New Imperial History’?” (Gorobets, 2022). Adequate responses require not only an analysis of all available historical material concerning the transformation of the Russian imperial expansionist policy toward Ukraine but also a certain reassessment of the historiosophical component of this issue. It is also important to consider that the paradigm of contemporary the Russian neo-imperial expansionism was established as early as the 18th century through an imperial policy aimed at destroying the national identity and consciousness of all peoples subjugated by Russia, while simultaneously exploiting their potential for further wars of conquest.

Review of Recent Research and Publications. The theme of the Russian imperial expansionism is widely represented in historiography and contemporary academic discourse, notably finding reflection in the studies written by the Ukrainian scholars.

M. Doroshko and Iu. Tsyryfa conducted a comprehensive analysis of the works of K. Marx and F. Engels regarding the historical circumstances of the formation of Muscovy-Russia’s expansionist foreign policy course. They specifically drew attention to the authors’ devastating criticism of the foreign policy of the Russian state formations from the 13th to the 19th centuries, which was directed toward achieving world domination (Doroshko, & Tsyryfa, 2023, p. 77). This provides a genetic analysis that helps establish the origin and nature of Muscovite autocracy. Consequently, due to the systematic genetic approach, it is possible to determine the conditions for the formation, development, and transformation of Muscovite autocracy into the Russian imperialism.

Yu. Harari focused on the categorical and terminological definition of the concept of empire, identifying two main characteristic features: 1) uniting several peoples under one authority; and 2) territorial flexibility and cultural diversity. Using the method of critical analysis, Harari attempted a historiosophical reassessment of the significance of empires. He stressed out that the existence of empires lacks historical perspective because it is

impossible to rule effectively a large number of conquered peoples for an extended period. Even the possible resurgence of some neo-empires is unacceptable, given that empires are a source of aggression and exploitation and contradict the right of every nation to self-determination (Harari, 2019). There was drawn attention to certain issues of definitions by I. Verkhovtseva and O. Kondratenko. In particular, they refuted the thesis of “historical Russia” within the Russian Empire as inherently anti-scientific. That is, the concept of “historical Russia” is defined as a manifestation of Eurasian colonialism (Verkhovtseva, & Kondratenko, 2024, p. 166). L. Zaliznyak revealed fairly thoroughly the historical roots of Russia’s imperial policy and aggression against Ukraine (Zaliznyak, 2016; Zaliznyak, 2017). H. Turchenko studied the circumstances surrounding the emergence of the Russian imperial project “Novorossia” in 1764 (Turchenko, 2016). Furthermore, F. Turchenko and H. Turchenko (Turchenko, & Turchenko, 2021; Turchenko, & Turchenko, 2015) conducted a theoretical and historiographical analysis of the “Novorossia” project as a dominant manifestation of the Russian imperial expansionism. There was provided a thorough theoretical and methodological understanding of such essential phenomena in Ukrainian history as the frontier and multifrontier – understood as the “crossroads of borderlands” – including in the context of the colonial past in the collective study the “Ukrainian Multifrontier” (Ukrainian Multifrontier, 2024). P. Hai-Nyzhnyk traced the succession of the Russian Empire to the Russian Federation in its expansionist policy and the aggressive imposition of the idea of the so-called “Russian World” (Hai-Nyzhnyk, 2016, p. 50). Based on the systemic crimes of the Russian Federation during its full-scale aggression against Ukraine, V. Telvak, V. Ilnytskyi, V. Starka, and M. Haliv traced the general tendency of the Russian imperial expansionist policy toward terror and genocide (Telvak, & Ilnytskyi, 2023, pp. 249–258; Telvak, Ilnytskyi, & Telvak, 2024, pp. 217–218; Ilnytskyi, Starka, & Haliv, 2022, pp. 43–55). M. Gaukhman’s research is particularly noteworthy, linking the policy of the Russian expansionism to the introduction of the doctrine of Cameralism by the Russian emperors as a guarantor of large-scale aggressive wars (Gaukhman, 2018).

Professor Serhii Plokyh, a Ukrainian historian, who joined the corporation of the American academics at Harvard University, also contributed to the study on the Russian imperial expansionism transformation actively (Plokyh, 2015). He pointed at Russia’s historical claims during its expansion into neighboring countries. S. Plokyh advocated the view that the rise of the Russian state, the Russian nation, and its great-power status was predominantly secured owing to Ukraine (Plokyh, 2020). The above-mentioned study necessitates the application of a systemic approach, which is appropriate for studying the political system of the Russian imperialism in the entire complexity of its interconnections.

There should be highlighted the contribution of Professor Vera Tolz (University of Manchester) among foreign authors. She noted that the Russian political and media establishment rejects the very possibility of assessing the Russian cultural heritage critically. Furthermore, Putin uses Dostoevsky’s ideas about Russia’s messianic role in the world. The Kremlin justifies the war in Ukraine with rhetoric from the mid-19th century: “where the Russian imperial flag has been raised once, it must remain the territory of Russia forever” (Tolz, 2022). Due to the systemic analysis, it is feasible to delineate the transformation of the Russian imperial expansionism into the current aggression of the Russian Federation against Ukraine within the historiosophical dimension.

Most works concerning the Russian imperial expansionism only reveal separate aspects or are limited to a specific chronological period. Therefore, there is a need for a more comprehensive

reassessment of the transformation of the Russian imperial expansionist policy (the 18th – mid-19th century), taking into account the existing Ukrainian historiographical context.

The purpose of the research is to reassess the transformation of the Russian imperial expansionist policy from the 18th century to the mid-19th century, with an emphasis on the historiographical component of the Ukrainian context.

Research Results. The process of the formation of the Russian Empire, starting from the beginning of the 18th century, led not only to the territorial expansion of the Russian state but also to the intensification of autocratic, despotic governance. Consequently, the policy of the Russian Empire was distinctly expansionist. It was manifested primarily in the Russian state's foreign policy course aimed at extending and consolidating its dominance over other countries. In addition to its ideological and economic manifestations, the Russian imperial expansionism had a clear military political expression in the form of armed expansion and the occupation of neighboring territories. Thus, the Russian imperial expansionism had an Eastern type, where the imperial expansion occurred at the expense of the adjacent territories. However, this type differed from the classical colonial variant of expansionism. It was possible to become the part of the Russian Empire usually under conditions of patronage and protectorate. Thus, even in these cases, aggressive and violent methods and means of subjugating neighboring peoples predominated.

The peoples, who fell under the Russian rule were deprived of the opportunity for self-expression. The statehood that was beginning to emerge among them in the new era was violated and interrupted by annexation to the Russian state. This primarily concerns Ukraine, Lithuania, Georgia, Armenia, the Azerbaijan Khanate, the early state formations of the North Caucasus, the states of Central Asia, and the Tatar Khanates of Volga region and Siberia. Some people were never able to embark on a path to state development. Russia seized ancient states, medieval early state formations, and tribal enclaves. The Russian Empire sought to absorb virtually all neighboring peoples, regions, and civilizational complexes. As a result, a vast multinational state was formed, where elements of diverse civilizational orientations coexisted. At the same time, the closest countries were subjected to the greatest oppression. This primarily concerns Ukraine and Belarus. The Russian authorities attempted to unite the Orthodox population under the aegis of the Russian Church and state, denying the Ukrainians and the Belarusians the right to the national distinctiveness.

Developing the concept of the Southern Ukrainian frontier during the 18th–19th centuries, Ya. Vermenych asserted that throughout this period, the Russian Empire managed to absorb many peoples with the most diverse cultural and historical heritage – ranging from the “Western” Swedes of Finland to the “Asian” Tatar and Nogai hordes of the Black Sea region (Vermenych, 2024, p. 385). Following a rapid expansion into new territories, the Russian imperial regime had to broaden the ideological and historiographical basis to legitimize these conquests. For example, after carrying out the hybrid occupation of the Crimean Khanate between 1772 – 1783, the Russian authorities, among other things, deprived the Crimean Tatars of their written and historical heritage. The history of the Crimean Khanate, left without a documentary basis, quickly became a hostage to the historiography of the Russian Empire. Imperial historians in Russia interpreted the history of the Crimean Khanate in a version that suited the conquering country.

The Russian imperial government sought to extend its military political system to neighboring lands. This led to a moral and political crisis in the Ukrainian society toward the end of the 18th century (Popovych, 1995, p. 178). According to A. Miller, the abolition of the

Hetmanate institution in Ukraine during the reign of Catherine II was partially compensated by privileges for the Cossack starshyna, who were granted rights equal to those of the Russian nobles (Miller, 2015, pp. 314–315). Consequently, the transformation of a segment of the Cossack starshyna into the Ukrainian nobles and their merger with the Russian nobility began at the end of the 18th century. Simultaneously, the Little Russian Governor-Generalship was converted into an ordinary hubernia of the Russian state. Other countries were also transformed into the Russian hubernias (provinces) during the second half of the 18th century. This included the Polish-Lithuanian Commonwealth, which was partitioned during its three divisions (1772, 1793, and 1795) and divided among the Habsburg Monarchy, Prussia, and the Russian Empire.

The Russian historiography interpreted this process as the return of territories that once belonged to the state of the Rurikids, which encompassed all lands of the Eastern Slavs – subjects of the Kyivan kniazis (princes) (Filiniuk, 2020, pp. 136–137). By these means, the Russian imperial authorities sought to establish the historical expediency of their participation in the partition of the Polish-Lithuanian Commonwealth, emphasizing their original rights to the lands inhabited by the Eastern Slavs. In this paradigm, the Russians, the Ukrainians, and the Belarusians were viewed as a single Orthodox people of the same faith, unlike, for example, the Catholic Poles. Thus, it was acquired both ethnic and religious grounds for the Russian state in order to participate in the struggle for the Polish legacy.

According to O. Kondratenko, the idea of the reunification of all Russian lands under Russian tsarist rule gained even greater ideological significance in the 19th century. This was driven by the imperial regime's attempts to justify the right to establish a single Russian nation through the "reunification" of the Russian, Ukrainian, and Belarusian peoples under the designations of Great, Little, and White Rus'. These three components were seen as the foundation of the Great Russia, representing the final stage of gathering the East Slavic lands around the imperial center (Kondratenko, 2023, pp. 65–66).

S. Plokyh believed that the Russian state, by participating in the three partitions of the Polish-Lithuanian Commonwealth, aimed not only to expand its borders but, above all, to suppress the ideals of the Great French Revolution that had already spread in Poland. As a result, Catherine II forgot her own interest quickly in the ideas of the Enlightenment and adopted reactionary methods against anything that could pose a threat to autocracy (Plokyh, 2020, pp. 60–61). Thus, despite all attempts by the Russian monarchs to give their empire a more civilized, the European appearance, the Russian state remained despotic and autocratic, as it had been during the Middle Ages. It is particularly important to emphasize that from the second half of the 18th century until the mid-19th century, the Russian Empire effectively played the role of the Gendarme of Europe, brutally suppressing all national liberation movements.

The system of state institutions in the incorporated territories was implemented in accordance with the traditions of state life in the Russian Empire. The local elite, which valued the political and material benefits of its status, was not removed from ruling its own territories upon entering Russia; instead, it received this right as privileges granted by the Emperor (Shandra, 2005, pp. 47–48).

The doctrine of Cameralism was intended to contribute to this to some extent. The Russian authorities borrowed it from the German scholars of the 18th century, primarily from the works of J. H. G. Von Justi. Unlike European mercantilism, German cameralism focused much more on population growth, the general good, and the happiness of every individual and society as a whole. It is evident that such an approach from the Russian state might have

appealed to the Ukrainian Cossack-starshyna elite. The Russian Empire possessed virtually all the main characteristics of a “cameralist” state, including a large bureaucratic apparatus, active development of mining, the arms industry, and so forth already in the 18th century (Gaukhman, 2018). It should be noted that due to tools like Cameralism, the Hetmanate was quite rapidly incorporated into the political and legal system of the Russian state. Consequently, the Ukrainian Cossack army was intensely utilized by the imperial authorities in the empire’s numerous wars, and the representatives of the intellectual and religious elite were used in the process of building imperial institutions, the church, education, and so on.

According to V. Shandra, for a long time, the descendants of the Cossack starshyna, who did not reconcile themselves to the conditions of their transfer to the status of the Russian nobility continued to defend their legal status (Shandra, 2001, pp. 12–13). There arose a movement among them demanding that starshyna ranks be recognized as sufficient grounds for granting nobility. The patriotic opposition manifested itself in the collection of the royal, hetman, and tsarist charters, the study of their own history, and the writing of historical and polemical works on the Ukrainian issues. This process led to the awareness of the distinct history of the small homeland, ethno-national identity, and ideas for the restoration of autonomy. The memory of the Cossack self-governance was best preserved in those Ukrainian lands of the Russian Empire that enjoyed varying degrees of political autonomy until the second half of the 18th century – Sloboda Ukraine (until 1765), Zaporizhzhia (until 1775), and Left-Bank Ukraine (the Hetmanate until 1785).

This memory manifested on two levels. At the level of the common people, the Cossack traditions continued to be preserved among the serf peasantry, for whom references to the Cossacks were primarily the memory of the rebellious Zaporizhzhian Sich with its unique order and irreconcilability to the social, national, and religious oppression. At the level of the new Ukrainian nobility, descendants of the Cossack starshyna, Ukraine’s glorious past was associated with the memory of the Cossack state – the Hetmanate. The expatriates from the former Cossack elite (represented by a whole pleiad of scholars, writers, and political figures) became the leading creators of the ideological concept of the Ukrainian national revival. It was primarily due to the historical memory of the Cossack legacy that Ukrainian society was able to resist the policy of the Russian imperial expansionism for a long time.

A gradual transition of a portion of the former Cossack starshyna to the Russian nobility (primarily the bunchukovi tovaryshi – standard-bearers) inevitably caused a split within the Ukrainian elite. The part of the starshyna that could not attain the noble status (viyskovi and, especially, znachkovi tovaryshi (badge comrades) – military and less military brothers-in-arms) was forced to choose between continuing their service – now within the Black Sea Cossack Host – or adapting to the new realities of the imperial society. Naturally, under these conditions, a major part of the Ukrainian gentry and Cossack starshyna viewed education and science as one of the most acceptable paths for self-realization.

V. Kravchenko claimed that the idea of education was quite widespread among the representatives of the Ukrainian elite. After 1783, the expatriates from the Cossack starshyna, who lost the right to nobility increasingly traveled abroad to study at Western European universities (Kravchenko, 2011, p. 92). Simultaneously, the spread of the Russian state-legal system in Ukrainian lands throughout the 18th century caused a corresponding reaction from progressive thinkers and public figures, especially those originating from the Cossack starshyna. The vast majority of the Ukrainian elite were forced to adhere to the imperial ideology in one way or another.

It should be highlighted that the process of the Cossack starshyna's entry into the Russian nobility was quite complex. For a long time, the Cossack elite representatives were in opposition to the imperial reforms. This situation was provoked by St. Petersburg itself, which was not very willing to recognize the noble rights for the Cossack starshyna. Furthermore, the Cossack starshyna's representatives sought to obtain the rights and privileges enjoyed by the Polish gentry. In 1767, there were held elections for the Russian nobility to the commission for drafting the "New Code" (a code of noble rights). H. Poletyka, a descendant of an ancient Cossack family from Poltava region, who showed himself to be a supporter of the Hetman state's autonomous rights in Ukraine, was elected as a Deputy from the nobility of Lubny Regiment. However, the oppositional sentiments among the representatives of the Cossack starshyna gradually faded during the 1780s, becoming particularly noticeable after H. Poletyka's death in 1784.

The process of the Ukrainian people's national self-determination, especially starting from the 17th century, intensified society's interest in the universal foundations of European civilization – the Antiquity, the Christianity, and the Enlightenment. In this era, the imperative of the time manifested not only in the intensification of the struggle for the national independence but also in the founding of Kyiv Mohyla Academy and other educational institutions, the commencement of using pan-European educational programs, and the creation of the "republic of the spirit" among the European scholars, about which H. Skovoroda wrote. The Ukrainian spiritual heritage of the 17th – 18th centuries underwent the ideological influence of the Russian colonialism, was assimilated, and subsequently appropriated by the Russian culture. Nevertheless, in the second half of the 17th century, and especially during the 18th century in Ukraine, new cognitive orientations, ideologically aimed at affirming progressive social ideals in the citizens' consciousness, were established, primarily due to the activities of Kyiv Mohyla Academy. The above-mentioned manifestations can be found in the contemporary Ukrainian political-legal and ethical thought, which was aimed, first and foremost, at cultivating "social political virtues" and the legitimacy of adhering to earthly values in the consciousness of the Ukrainian people.

The study "The History of the Rus or Little Russia" was significant for the national self-awareness of the Ukrainians, which was inspired by the ideas of independent development of the Cossack knightly branch of the imperial nobility. Its supporters were continuators of the ideological and political tradition of the Pereiaslav Agreement and did not forget that it was supposed to be an agreement of the 18th century. "The History of the Rus or Little Russia" was a well-camouflaged (written on two planes: externally loyal to the empire, and internally pro-independence) collective work of members of a Ukrainian secret society, created between 1815 and 1828. Its authors, the descendants of the Cossack starshyna operating both in St. Petersburg and on the territory of the former Hetmanate, viewed Ukraine's past as that of an independent nation (History of the Rus or Little Russia, 1991, pp. 94–95).

Z. Kohut noted that "The History of the Rus or Little Russia" should be considered the apotheosis of the Ukrainian concept of "Pereiaslav", which presented the image of Ukraine as a state that had never been conquered and whose existence was determined by the "eternal rights and liberties" of its people (Kohut, 2006, pp. 294–295). Furthermore, V. Kravchenko remarked that the interpretation of the Pereiaslav Agreement in the "History of the Rus or Little Russia" is marked by the historiosophical novelty, as the author of this work first called the Pereiaslav Agreement a treaty between equal states, a union of "equals with equals and free with free" (Kravchenko, 2011, pp. 216–217).

In general, “History of the Rus or Little Russia” is considered a multi-layered political pamphlet with a rather pronounced state-political subtext. Simultaneously, according to M. Skrynnyk in the “The History of the Rus or Little Russia”, the source of the eternal and infinite is not absolute spirituality, but the spirituality of the nation. The luminous abyss is transformed into the idea of the nation. The idea of the nation is by nature a form of the archetype of the Clan in the culture of 18th – century Europe. According to the concept of “The History of the Rus”, only certain individuals can grasp that the nation is a form of God’s manifestation in humanity. These individuals are revealed that the form of the existence of the nation, God, and spirituality is one and the same: freedom. And if the nation and spirituality are in a state of unfreedom, those to whom the truth is revealed must lead the nation from unfreedom to truth, which is freedom. They must do this because it is the will of God, and they are only the elect of this will; for the world of people, they are heroes. The birth of the national idea runs parallel to the formation of the idea of the individual in the national mentality. The emergence of the idea of the nation and the idea of the individual requires a high degree of mentality and a corresponding level of the people’s historical maturity (Skrynnyk, 1993, pp. 122–123).

Alongside this, V. Potulnytskyi argued that the “History of the Rus” contains two main ideas: the Ukrainian nation has the right to enter into any international political coalition; and the Cossack officer class, which originated in the 15th century, gained its estate privileges, like other nobility and chivalry of Western Europe and the Polish gentry, by its own saber through struggle on the battlefield (Potulnytskyi, 2001, p. 84).

According to Z. Kohut, the Ukrainian elite, which functioned as the gentry, was formed during the Hetmanate. It emerged after B. Khmelnytsky’s revolution and was incorporated into the Russian nobility at the end of the 18th century. However, “as bearers of certain historical traditions, the gentry of the Hetmanate preserved at least a shred of historical continuity from the time of Khmelnytsky to the modern era” (Kohut, 2004, p. 29). Nevertheless, due to the intensification of the Russian imperial policy, this Ukrainian elite was never able to become a national cultural elite. This occurred, among other reasons, due to the lack of adequate national self-identification among Ukrainians. They usually identified themselves as “rus’ki”, “rusyny”, “cherkasy” (the Cossacks), or were forced to accept the exonym “Little Russians” (malorosy) imposed by the Russian great-power policy.

There took place a process of involving the Ukrainians in the development of the Russian institutions starting from the end of the 17th century, and especially during the stage of the Russian Empire’s consolidation, which the authorities attempted to develop by analogy with Western European states. Generally the Ukrainians were more educated than Muscovites and significantly closer to Western civilization and showed both a desire to maintain a certain social status (primarily the Cossack starshyna) within the imperial hierarchy and a tendency to implement their ideas and potential at a new state level (primarily the representatives of the clergy and intellectual elite). Consequently, as early as the turn of the 17th–18th centuries, the Russian state began the intensive absorption of the Ukrainian human resources: the most intellectual, socially active, and multi-talented Ukrainians, including those with military talent. This was necessary for the Russian Empire to carry out its expansionist policy, wage constant colonial wars, and conquer neighboring territories.

David Saunders drew attention to the fact that in the second half of the 18th century, in accordance with the imperial plans for educational centralization and the unification of newly annexed territories to the Russian state, a process of the Ukrainians outflow to St. Petersburg

and Moscow began. This was because, at that time, there were significantly better prospects for the students to obtain education and the for teachers and the scholars to pursue career advancement there (Saunders, 1985). Thus, virtually the entire powerful Ukrainian spiritual and cultural-educational potential was utilized for the educational and cultural enlightenment development of Russia. According to V. Potulnytskyi, it was the expatriates from Ukraine, who began to occupy almost all positions in the Russian Empire that determined the strategic course of the evolution in the European direction of the development of culture, science, and even the system of the state and church administration (Potulnytskyi, 2002, pp. 214–215).

From the end of the 18th century, the Ukrainians began to be subjected to systematic Russification in the Russian Empire. This issue particularly intensified in the 19th century in the Ukrainian lands that were part of the Russian Empire. By the mid-19th century, the imperial chauvinistic policy of the Russian imperialism sought the total destruction of the Ukrainian national identity (Sytnyk, Drogomyretsky, Sytnyk, & Sizarev, 2023, p. 303). Under these circumstances, when one part of the Ukrainian national elite – the Cossack starshyna – was preoccupied mainly with preserving its own rights, and the other part – the intelligentsia – was increasingly oriented toward Moscow and St. Petersburg, the Ukrainian ethnic group seemed doomed.

However, in 1805 the establishment of Kharkiv University became an important factor in the Ukrainian national revival. According to I. Lysyak-Rudnytskyi, Kharkiv University, led by V. Karazin, played a key role in the initial, nascent stage of the formation of the modern Ukrainian nation (Lysyak-Rudnytskyi, 1994, pp. 205–208). Consequently, the concept of the national distinctiveness emerged within the walls of Kharkiv University. The key ideological guide became the concept of “peoplehood”. Following I. Kotliarevskyi with his “Eneida”, the Ukrainian historiography initiated the process of transforming the Ukrainian language into the main marker of the national identification. However, the Russification of Ukraine and the policy of the cultural assimilation of the Ukrainian people, carried out by the administrative and the police means of the Russian government, found moral support and ideological justification from the Russian intelligentsia and the Russian science. A vivid exponent of this Russian great-power ideology was, for example, the Russian writer V. Belinsky, who promoted not only the linguistic Russification of the Ukrainians but also their complete assimilation into the Russian culture and merger with the Muscovite nation.

One of the instruments of denationalization was education. The Russian authorities created state schools with uniform organization, identical programs, and requirements aimed at the Russification of peoples. Consequently, all schools, from higher to lower, in Ukraine had Russian as the language of instruction. It was not permitted and was even forbidden to use the native language. The textbooks dealt exclusively with the Muscovite-Great Russian people, their history, customs, etc. The Ukrainian people, their history, and traditions were never mentioned. In school, a child entered a spiritual atmosphere distant from them, a world foreign to them (Bidnov, 2002, pp. 63–65). The consequence of this was relapses into illiteracy and the destruction of the national consciousness. Further bans on printing literature in Ukrainian and other restrictions on the use of the native language by the Ukrainians only complicated the development of spirituality and the national self-awareness.

In this context, H. Grabovich suggested that the example of M. Hohol is illustrative. Hohol, operating on the boundary between the Ukrainian and Russian worlds, was simultaneously a product of the Cossack past and a representative of the Russian imperial reality. This is perhaps where Hohol’s greatest personal tragedy manifested. The rupture between the past

and the present, between the world of Ukraine and Russia, was felt as a deep one, and this permeated almost all of M. Hohol's literary work (Grabovich, 1994, p. 78).

Considering M. Hohol's attitude toward the imperial ideology and the Russian nationalism, Harvard University Professor Edyta Bojanowska drew attention to the fact that Hohol's Ukrainian nationalism reached its peak as a result of his study of the Ukrainian history. Thus, Hohol concluded that, unlike Russia, Ukraine had a self-sufficient cultural integrity, national traditions, and self-consciousness (Bojanowska, 2013, p. 544). This viewpoint is credible, as M. Hohol, having sharply criticized the Russian state-bureaucratic system that had established itself in his homeland, sought to turn to the Ukrainian national traditions. In *Taras Bulba*, he captured the important ideological moment when the Ukrainian people, defending their sovereignty and rights, acted together as a force that defined the character of pan-European history. M. Hohol highlighted the high role of the principles of comradeship and brotherhood inherent in the Zaporozhians particularly. Hohol's Cossack origin led to his attentive attitude toward the Cossack estate. Recognizing and depicting in his works the demise of the Cossack families, who were transforming into the monstrosities of the Russian nobility – a kind of dead souls – M. Hohol sought to realize the idea of the spiritual and moral renewal of the Russian Empire (Horbach, 2006, p. 126). He viewed evolutionary moral and ethical improvement of society as one of the means to achieve this.

M. Hohol's quite noticeable role in the process of ideological formation in Ukraine manifested primarily in his decisive opposition to the secularization characteristic of his era. His attitude was especially critical toward those manifestations of the secular system that severed creativity from its connection with the Church. According to V. Zinkivskyi, M. Hohol deeply felt the universal scope (*vsemirnost'*) of Christ's teaching, the possibility of applying it to all life themes. It was precisely this feeling for the truth of the Christianity and its value for all forms of life that sharply distinguished M. Hohol from his contemporaries, who had pushed the Church into the background and rejected its blessed assistance (Zinkivskyi, 2000, p. 416). Thus, M. Hohol acted as a kind of prophet of the Orthodox culture, a forerunner of all those spiritual currents in the Russian life that sought to find the true, not nominal or symbolic, triumph of Orthodoxy.

M. Hohol sought peace among people and harmony with God, analogous to the aspirations of H. Skovoroda, P. Yurkevych, P. Kulish, and a number of other Ukrainian thinkers. Thus, the ideal of the external harmony is joined by the ideal of internal harmony, which is the highest ideal for the Ukrainian thinkers, the goal toward which they all strive (Zinkivskyi, 2000, p. 187). Hence, the great attraction to religiosity and the desire to find a connection with God. According to M. Hohol's conviction, God is not only the creator of the world and life but also the inspiration for creative achievements. Undoubtedly, M. Hohol only initiated the establishment of that ideological current which was directed against the secular emasculation of the genuine spiritual essence of the Christianity.

From the end of the 18th century, despite the attempts of some representatives of the Ukrainian ideological and political thought to defend their own traditions and rights, the Eastern Ukrainian lands increasingly fell under the influence of the Russian Empire. This led, among other things, to the emergence of leading the Russian ideological directions there. The spread of the Enlightenment, liberal noble ideology, etc., was observed in the Eastern Ukrainian lands. The Napoleonic Wars and the Polish Liberation Uprising of 1830 – 1831 accelerated the crystallization of the national movements in the Russian Empire. However, the introduction of the Uvarov reforms, which proclaimed narodnist "peoplehood" along with the autocracy and the Orthodoxy as the fundamental principles of great-power ideology,

marked the beginning of intensified the Russification of the state apparatus and other non-Russian peoples residing in the Russian Empire. The doctrine developed by Count Uvarov for the construction of the Russian imperial nation and empire-state was based precisely on the triad of the “Orthodoxy, Autocracy, Nationality”, which became known as the “Theory of Official Nationality”. This was essentially the antithesis of the leading slogan proclaimed by the Great French Revolution: “liberty, equality, fraternity”. Uvarov’s doctrine was primarily based on the Orthodoxy as the leading pillar of the autocratic power of the Russian Emperor. Moreover, the Orthodoxy combined with autocracy was intended to become the ideological basis of the Russian imperial expansionism, which entailed the suppression of democratic freedoms and the imposition of despotism.

M. Doroshko and Iu. Tsyrya pointed out that K. Marx and F. Engels asserted that the foreign policy strategy of Muscovy-Russia was borrowed from the Khans of the Golden Horde and retained its imperial expansionist essence throughout the 13th–19th centuries. Subsequently, the Russian Empire was transformed first into the Soviet Union and later into the Russian Federation (Doroshko, & Tsyrya, 2023, p. 77). However, despite the change in names, the political essence of the Russian neo-empire remained virtually unchanged. Even when socialist or democratic republican systems were declared instead of monarchical autocracy, traditional Russian despotism was always transformed into authoritarianism and totalitarianism. In doing so, there was always a desire to maintain its imperial status – especially through expansionism into neighboring territories – a desire not only anticipated by the founding fathers of Marxism but also by the entire civilized world.

Conclusions. The entire essence of the Russian imperial expansionism manifested itself during the second half of the 18th to the mid-19th century. It was evident not only in the Russian Empire’s conquest of neighboring territories but also in the practice of the ideological political and moral psychological incorporation of their peoples into the imperial ideology. By capturing new territories, the imperial authorities primarily sought to destroy the national identity and self-awareness of the subjugated peoples to subsequently use them for the imperial expansion into new lands.

After Catherine II signed the Charter to the Nobility in 1785, the representatives of the Ukrainian elite became more concerned with obtaining the rights to the noble status. The process of involving the Ukrainians in the development of culture, science, and the system of state and church administration in the Russian Empire, following the European model, also intensified. The Ukrainians were more educated than the Russians and significantly closer to Western civilization and showed both a desire to maintain a certain social status (primarily the Cossack *starshyna*) within the imperial hierarchy and a tendency to realize their ideas and potential at a new state level (primarily representatives of the clergy and intellectual elite). Consequently, as early as the turn of the 17th – 18th centuries, the Russian state began the intensive absorption of the Ukrainian human resources: the most intellectual, socially active, and multi-talented Ukrainians, including those with military talent. This was necessary for the Russian Empire to carry out its constant expansionist policy. To this end, it sought the increasingly intensive use of the significant Ukrainian spiritual, intellectual, and political legal potential of the Ukrainians. Subsequently, the Russian state (in any manifestation: the imperial, Soviet-Bolshevik, or contemporary neo-imperial) strives at all costs to maintain control over these vital Ukrainian resources.

The analysis of the transformation of the Russian imperial expansionist policy from the 18th to the mid-19th century, in light of contemporary realities, requires a more thorough reassessment. This particularly concerns the historiosophical component of the process of

integrating representatives of the Ukrainian national elite into the Russian state and society. The policy of the Russian Empire in Ukraine during the second half of the 18th to the mid-19th century underwent a significant evolution –from unification measures, generally characteristic of any empire’s legal nature, to overtly discriminatory steps against the Ukrainians, driven by a chauvinistic orientation that accompanied the formation of the political Russian nation. It should therefore be emphasized that the Russian imperialism was chauvinistic and expansionist in nature. This made it especially aggressive toward peoples, who demonstrated alternative values: democracy, republicanism, and a strong sense of freedom. In contrast to the practice of the Russian imperial autocracy, the Ukrainian society, formed on the traditions of democracy and republicanism, and due to the historical memory of the Cossack self-governance and the Cossack-Hetman state, was able to resist the policy of the Russian chauvinism for a considerable time. It is no coincidence that the Ukrainian nation and its statehood came under the main blow of the Russian expansionism and the policy of Russification. Furthermore, the Ukrainians were among the most active in opposing the Russian imperial policy. Thus, the necessity arises to refute a number of the Russian great-power myths regarding “brotherly peoples”, the “civilizing role” of the Russian Empire, and so forth. Indeed, the policy of the Russian imperial expansionism during the 18th to mid-19th century clearly demonstrated a complete disregard for all neighboring peoples, especially the Ukrainians. Moreover, the imperial policy was directed at nullifying the cultural distinctions between the Ukrainians and the Russians, and consequently – the destruction of Ukrainian national identity.

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Oleksandr TRYGUB

PhD hab. (History), Professor, Professor of the Department of International Relations and Foreign Policy, Petro Mohyla Black Sea National University, 10, 68 Desantnykiv Street, Mykolaiv, Ukraine, postal code 54003 (alextrigub@ukr.net)

ORCID: 0000-0003-0610-1702

ResearcherID: P-1173-2017

Scopus Author ID: 57215006812

Natalia BUHLAI

PhD hab. (History), Professor, Professor of the History Department, Admiral Makarov National University of Shipbuilding, 9, Heroes of Ukraine Ave., Mykolaiv, Ukraine, postal code 54025 (buglay@ukr.net)

ORCID: 0000-0002-0674-4313

ResearcherID: ABF-7755-2022

Scopus Author ID: 58930745600

Олександр ТРИГУБ

доктор історичних наук, професор, професор кафедри міжнародних відносин та зовнішньої політики, Чорноморський національний університет імені Петра Могили, вул. 68 Десантників, 10, м. Миколаїв, Україна, індекс 54003 (alextrigub@ukr.net)

Наталія БУГЛАЙ

докторка історичних наук, професорка, професорка кафедри історії, Національний університет кораблебудування імені адмірала Макарова, пр. Героїв України, 9, м. Миколаїв, Україна, індекс 54025 (buglay@ukr.net)

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**THE TRUE ORTHODOX CHURCH IN THE SCIENTIFIC DISCOURSE
OF THE SECOND HALF OF THE 20th – THE FIRST QUARTER
OF THE 21st CENTURY**

Abstract. *The phenomenon of the True Orthodox Church (TOC), also known as the “catacomb church”, belongs to the complex and controversial plots of the history of Orthodoxy in the 20th century, as it arose in the context of the radical transformation of state-church relations after the 1917 revolution and the formation of opposition among some of the clergy and laity to the policy of loyalty of Moscow Patriarchate towards the Soviet government. The long-term illegal existence of underground Orthodox communities, the limited nature of the source base, and the ideological bias of early research led to the uneven development of scientific understanding of this phenomenon. The purpose of the article is to critically analyze the main stages and directions of studying the True Orthodox Church, to compare*

key research approaches, and to identify prospects for further studies. **The methodological basis of the study** is a complex of principles of historicism, problematics, and interdisciplinarity using special historical methods – historical comparative, problematic chronological, and historiographic analysis. **The scientific novelty** of the article consists in the systematization of the main directions of studying the TOC in the Soviet, Russian, and Ukrainian historiography, a critical comparison of their methodological approaches and source capabilities, as well as in determining the specifics of the Ukrainian research tradition formation in this area. **Conclusions.** The analysis of historiography shows that the study of the True Orthodox Church was formed gradually and unevenly. The Soviet historiography considered underground Orthodox groups mainly through the prism of the state's anti-religious policy and did not form a coherent scientific concept of the TOC, although it accumulated a significant empirical material. A new stage began after the opening of archives in the 1990s, when the Russian researchers introduced a significant array of documents of repressive bodies into scientific circulation and initiated a systematic study of the catacomb movement. Since the 1990s the Ukrainian historiography has gradually formed its own research tradition, based mainly on archival and investigative materials and regional studies. At the same time, the issue under study remains insufficiently generalized: a significant part of the sources has not yet been introduced into scientific circulation, and regional studies require synthetic understanding. Further studies should be aimed at expanding the source base, clarifying the conceptual and terminological apparatus, and creating generalizing studies that will enable scholars to make a holistic reconstruction of the history of the TOC in the context of church life in the Soviet era.

Key words: True Orthodox Church, Catacomb Church, Church Underground, Orthodoxy in the USSR, historiography, state-church relations.

ІСТИННО-ПРАВОСЛАВНА ЦЕРКВА У НАУКОВОМУ ДИСКУРСІ ДРУГОЇ ПОЛОВИНИ ХХ – ПЕРШОЇ ЧВЕРТІ ХХІ ст.

Анотація. Феномен Істинно-православної церкви (ІПЦ), відомої також як «катакомбна церква», належить до складних і дискусійних сюжетів історії православ'я ХХ ст., оскільки виник у контексті радикальної трансформації державно-церковних відносин після революції 1917 р. та формування опозиції частини духовенства і мирян до політики лояльності Московської патріархії щодо радянської влади. Тривале нелегальне існування підпільних православних громад, обмежений характер джерельної бази й ідеологічна заангажованість ранніх досліджень зумовили нерівномірний розвиток наукового осмислення цього явища. **Мета статті** полягає у критичному аналізі основних етапів і напрямів вивчення Істинно-православної церкви, зіставленні ключових дослідницьких підходів і визначенні перспектив подальших студій. **Методологічне підґрунтя дослідження** становить комплекс принципів історизму, проблемності та міждисциплінарності з використанням спеціально-історичних методів – історико-порівняльного, проблемно-хронологічного та історіографічного аналізу. **Наукова новизна статті** полягає у систематизації основних напрямів вивчення ІПЦ у радянській, російській та українській історіографії, критичному зіставленні їхніх методологічних підходів і джерельних можливостей, а також у визначенні специфіки формування української дослідницької традиції у цій сфері.

Висновки. Аналіз історіографії засвідчує, що дослідження Істинно-православної церкви формувалося поступово та нерівномірно. Радянська історіографія розглядала підпільні православні групи переважно через призму антирелігійної політики держави та не сформувала цілісної наукової концепції ІПЦ, хоча накопичила значний емпіричний матеріал. Новий етап розпочався після відкриття архівів у 1990-х рр., коли російські дослідники ввели до наукового обігу значний масив документів репресивних органів і започаткували системне вивчення катакомбного руху. Українська історіографія з 1990-х рр. поступово сформувала власну дослідницьку традицію, що ґрунтується переважно на архівно-слідчих матеріалах і регіональних студіях. Водночас проблема залишається недостатньо узасадненою: значна частина джерел ще не введена до наукового обігу, а регіональні дослідження потребують синтетичного осмислення. Подальші студії мають бути спрямовані на розширення джерельної бази, уточнення понятійно-термінологічного апарату та створення узагальновальних праць, що уможливлять цілісне відтворення історії ІПЦ у контексті церковного життя радянської доби.

Ключові слова: Істинно-православна церква, катакомбна церква, церковне підпілля, православ'я в СРСР, історіографія, державно-церковні відносини.

Problem Statement. The phenomenon of the True Orthodox Church (TOC), also known as the “catacomb church” (although the identity of these two definitions is questionable), is one of the most complex and controversial subjects in the history of Orthodoxy in the 20th century. Its emergence was associated with a radical change in state-church relations after the 1917 revolution, when the Bolshevik government launched a systematic policy of secularization, administrative pressure, and repression against religious institutions. Under these conditions, the traditional model of functioning of the Russian Orthodox Church underwent a profound transformation, which caused internal differentiation of the church environment. The crisis was especially acute after the Declaration of Metropolitan Sergius (Stragorodsky) in 1927, which declared the loyalty of the church hierarchy to the Soviet state and provoked opposition from part of the episcopate, clergy, and laity, which took shape in the movement of true Orthodox.

It was in this context that a spectrum of underground Orthodox groups gradually emerged, refusing to recognize the new model of church-state relations and developing their own forms of religious life under conditions of conspiracy. In the 1927 – 1930s, these cells evolved from scattered groups of “unintelligible” to more structured networks, which in historiography received the generalized name of the True Orthodox Church (the author’s vision of the essence of various definitions for the phenomenon of “true Orthodox” is set out in a number of studies (Trygub, 2009, pp. 145–146; Trygub, & Bazhan, 2026), and as an alternative (Beglov, 2018, pp. 9–16; Kyrydon, 2012a; 2012b; Protsenko, 1998; Shumylo, 2011, pp. 52–53)). The post-war period was marked by both further marginalization of the catacomb movement under state pressure and the preservation of certain underground traditions in various regions of the USSR, in particular in Ukraine.

The long illegal existence of the TOC, the limited nature of the source base, and the ideological bias of a significant part of the early publications led to the uneven and contradictory development of its scientific understanding. Only after the opening of the archives at the end of the 20th century did the prerequisites for a more differentiated analysis of this phenomenon appear, which, however, did not eliminate a number of fundamental discussions in modern science.

In the development of the TOC historiography, it is appropriate to distinguish four stages: Soviet (the 1960s – 1980s), émigré (the 1940s – 1980s), the post-Soviet archival (the 1990s – early 2000s), characterized by the accumulation of archival materials on the activities of the TOC, and modern interdisciplinary (since the 2010s), when, along with the continued accumulation of archival documents, there is a desire for a deeper understanding of the phenomenon. Such periodization enables us to trace the evolution of research approaches and the degree of source coverage of the issue.

Review of Recent Research and Publications. The historiographical review of the object of our research was usually carried out as an introductory part of the monograph, or as a corresponding paragraph in dissertations. The only special publication that clearly focuses on the history of the study of the phenomenon of the TOC phenomenon is the extensive and thorough article by Alla Kyrydon (Kyrydon, 2012b) (which will be discussed further).

One of the first, in our opinion, modern analyses of the historiographical heritage regarding the true Orthodox movement, in particular Josephlian one, was made in the studies by the Russian researcher Mikhail Shkarovskii (Shkarovskii, 2000, pp. 41–46; Shkarovskii, 1999, pp. 4–6). Focusing his historiographical analysis on Soviet, émigré, and Russian historiography of the 20th century, the researcher’s conclusion remained unchanged for two

decades – “there are no special works dedicated to the Josephian movement in the Soviet and foreign historiography” (Shkarovskii, 1999, p. 4) (i. e., the author did not fully identify Josephians with the True Orthodox Church or True Orthodox Christianity, and calls it a separate “movement” within the Russian Orthodox Church environment).

Another Russian researcher, Aleksey Beglov, also provides a thorough historiographical analysis of the church underground issue in the USSR. The author consistently traces the evolution of approaches – from early Soviet anti-religious journalism to émigré and post-Soviet scholarship – and convincingly shows their methodological and ideological conditioning. The author reasonably emphasizes that for a long time the church underground was viewed not as an independent phenomenon of illegal religiosity, but through the prism of political or church-political opposition (Beglov, 2018, pp. 19–30). Since both object of research and its chronological framework (the 1920s – 80s) are broader in A. Beglov, the analysis of the available literature is somewhat deeper than in M. Shkarovskii. Although it should be noted that the main focus of the researcher is still on the events of the Stalin era, which increases the interest in his study by researchers of the history of the TOC, because the 1920–50s are the time of the greatest activity of the true Orthodox movement.

Overall, the text gives the impression of a highly professional historiographical reflection, which significantly expands the research field of the study of the church underground and offers a productive reorientation of the issue – from a narrowly institutional to a broader socio-cultural analysis. Despite some debatable points, the work has significant scientific value and is an important contribution to the modern understanding of the history of illegal church activity in the Soviet period. As a result, the author came to the conclusion that “throughout the entire time, starting from the 1920s, the topic of the church underground was mentioned in historiography in its pure form” (Beglov, 2018, p. 28). On the other hand, it should be mentioned that both Russian authors completely ignore the achievements of the Ukrainian historiography. And if for M. Shkarovskii this is excusable, because his key studies on the topic were published in the late 1990s, when the Ukrainian historians and religious scholars were only at the beginning of the path of studying the phenomenon of the TOC, then A. Beglov published his latest study, which is marked as the second and supplemented edition, in 2018, and the Ukrainian historians had already accumulated a fairly extensive factual, theoretical and methodological baggage in the field of studying the true Orthodox movement (V. Pashchenko, O. Trygub, O. Ihnatusha, S. Shumylo, D. Vedeneev, V. Shumylo and the others). In addition, the world saw the historiographical analysis by A. Kyrydon, which was published in both Ukrainian and Russian (see: Kyrydon, 2012a).

In the aforementioned article, A. Kyrydon reasonably emphasizes the fragmentary nature of the research on the study of the history of the TOC and suggests the attempt to systematize it, focusing on the Ukrainian historiography mainly. The positive aspects of the study the following ones: a wide source and historiographical base, the involvement of studies by the Ukrainian and foreign researchers, as well as the focus on the methodological and source-based aspects of the study of the TOC. At the same time, the historiographical analysis is sometimes descriptive and not always accompanied by a sufficient level of critical comparison of the positions of researchers. It would require a clearer formulation and the author’s vision of the conceptual and terminological issues (in particular, regarding the relationship between the True Orthodox Church and the True Orthodox Christianity), as well as a wider involvement of Western historiography. Some fragments of the text are overloaded with lengthy constructions, which somewhat complicates the reception of the material.

Finally, I would like to mention the historiographical review of the essence of the only dissertation to date dedicated to the history of the TOC, authored by Vitaliy Shumylo (Shumylo, 2021b, pp. 18–39). The author demonstrated profound knowledge of the source and scientific base, consistently traced the evolution of the study of the issue – from emigration church historiography of the mid-20th century to the post-Soviet and modern research. The strong point of the study is the careful introduction into the scientific context of key Ukrainian researchers' studies, as well as the emphasis on the importance of archival and investigative materials and diaspora heritage. Important is, first of all, the attempt to show the historiography of the regional specificity of the true Orthodox movement using the example of Chernihiv region. At the same time, in some items the review is of a compilative descriptive nature and is not always accompanied by a sufficient level of critical comparison of the positions of different historians. At the same time, the author convincingly substantiates the scientific niche of future historians – the lack of a holistic history of the TOC at the level of individual eparchies, and in particular in Chernihiv region.

Since we have a certain baggage of historiographic analysis, we will try to fill in some gaps, add our own vision of the author's positions, and trace the genesis of research into the history of the true Orthodox movement, primarily in the Ukrainian historiography. At the same time, the authors will consciously appeal and refer to the aforementioned predecessors to avoid repetitions and unnecessary tautologies (it is from this position that we will omit the consideration of foreign historiography, only mentioning the studies of recent decades briefly).

The purpose of the article is critical analysis of the main stages and directions of studying the True Orthodox Church, comparison of key research approaches and determination of prospects for further studies. Methodologically, the research is based on the principles of historicism, problematics, interdisciplinarity and source correlation.

Research Results. Soviet historiography. Within the Soviet historical and philosophical tradition, the issues of the emergence, development, and content of underground (catacomb) movements of Orthodoxy have almost never been considered. Moreover, in the Soviet historiography, the True Orthodox Church was not actually recognized as a separate church phenomenon. Underground Orthodox groups were described not in a confessional or church-historical sense, but through the prism of the state's anti-religious policy and were often identified with a sectarian movement. This led to a specific lens of research, within which the TOC appeared primarily as a politically unreliable environment. Thus, in one of the first studies (Klibanov, 1969), in which a cursory description of the true Orthodox environment was made, the famous Soviet religious scholar Aleksandr Klibanov noted that “the trends of “true Orthodox Christianity” and the “true Orthodox Church” do not differ in any essential way from Orthodox Orthodoxy in their dogma”, considering them “extra-church Orthodox trends” (Klibanov, 1969, p. 5). Despite the fact that the author focused on highlighting problematic issues of history and the contemporary situation of the Baptist, Evangelical Christian Baptist (ECB) and Adventist believers, on the pages of the study he repeatedly extrapolated his focus on the issues of the True Orthodox Church (TOC) and True Orthodox Christianity, showing their genesis during the 1930s – 60s (Klibanov, 1969, pp. 55–56, 172–176) (factual material for the study was collected during the expeditions in 1959–1961 by a research group of the Institute of History of the USSR Academy of Sciences under the leadership of A. Klibanov).

In 1973, an edited monograph by A. Klibanov was published, which was based on the same materials from the “field expeditions”. In the monograph, the author focused on the essence of the religious doctrine of the “true Orthodox” in a separate paragraph, also

revealing the prehistory of the emergence of the TOC and true Orthodox Christianity groups in Tambov region. Like his student L. Mitrokhin (see below), the author used the name of one of the currents of the TOC, led by Bishop Alexiy (Bui) – “buievshchyna”, or “buievtsi”. Based on the rhetoric and terminology, as well as some digital data from the 1930s, it can be concluded that A. Klibanov had limited materials from the KGB archives (possibly from the funds of the regional party committee) at his disposal. In his brief essay, the author concluded that “during the second half of the [19]50s, there was a collapse of true Orthodox Christianity, manifested in the departure of the majority of its members and its disintegration as an organized movement” (Klibanov, 1973, pp. 187–193). The author also provided a brief description of the TOC and true Orthodox Christianity groups in the context of the study of Lipetsk region, coming to the same conclusions that the true Orthodoxy “suffered bankruptcy” (Klibanov, 1973, pp. 198–201, 232–236).

One of the first special research on the history of the True Orthodox Church was the article written by the member of A. Klibanov’s research group – L. Mitrokhin (Mitrokhin, 1961). The author consistently interprets the TOC as a socially reactionary and politically unreliable phenomenon, comparing it to “sectarianism” and almost not considering the intra-church logic of the opposition formation after 1927. A characteristic feature of the study is also the typological generalization of diverse underground groups under a single conceptual label, which reflects the methodological attitudes of the Soviet religious studies of the 1960s. Like A. Klibanov later, L. Mitrokhin uses specific terms of the Soviet secret services of the late 1920s, such as: branches of the TOC, centralized anti-Soviet movement, anti-Soviet organization, religious fanatics, nuns, anti-Soviet group, etc. On the other hand, the author uses interesting facts, quantitative indicators, and materials from field sociological research, which can be useful in studying not only the historiographical aspect of the issue, but also various aspects of the history of the TOC – true Orthodox Christianity, because the author communicated with living witnesses of the emergence of true Orthodoxy and followers of the Bui’s branch, the so-called “first generation”. Of course, for a modern researcher, the study requires liberation from atheistic Soviet ideology, and the factual series needs to be verified by other sources, but our knowledge of the relevant archival files (SSA SSU, Fund 13. List 1. File 390). The Branch State Archive of the Security Service of Ukraine indicates that this study has not lost its source value. The article of another participant of A. Klibanov expedition, Z. Nikolskaia, is of a similar nature (Nikolskaia, 1961), who focused on the development of communities of true Orthodox Christians in Tambov region. Among the interesting conclusions of the author, it can be noted that the True Orthodox Christian communities transformed into TOC groups, including the so-called “silent” movement, at the turn of the 1930s and 1940s.

Perhaps, in the Soviet historiography the only monograph directly devoted to the true Orthodox movement was the study by Aleksandr Demianov (Demianov, 1977). As a former activist of the Ukrainian Orthodox Church, in his study he presented unique information obtained “from the inside”, through sociological field research and the study of archival documents. The researcher focused on the history of the emergence and formation of truly Orthodox Christianity, its social and ideological prerequisites, and the situation at that time. The author provides a description of the features of religious consciousness, beliefs and cult of the followers of the true Orthodox Christianity. The researcher first characterized the various directions of this movement. For us, these works are interesting because they relate to the historical conditions of the emergence of the true Orthodox Christianity – True Orthodox

Church, i. e., they reveal the general events of the 1920s – 30s. In addition, A. Demianov covers the events of the Central black soil district, which was headed by the Exarch of Ukraine for the TOC, Bishop Alexiy (Bui), and accordingly, the region was closely connected with the Eastern Ukrainian communities of “true Orthodox”.

At the same time, A. Demianov’s study is not devoid of source information: it is based on materials from state bodies and contains a number of empirical observations on the geography and social composition of underground communities. Given this, in modern historiography it is appropriate to consider it not as an analytical reconstruction of the TOC phenomenon, but as representative evidence of the official Soviet vision of the catacomb movement, which requires mandatory critical deconstruction, as a source of the author’s “field research”.

The True Orthodox Christianity is defined by the author as an independent religious movement that began to take shape in the first years after the October Revolution and emerged both as a product of a split in the Russian Orthodox Church and as a reflection of social tensions in the Soviet countryside. The author associates the social core of the movement primarily with the peasant environment, which he characterizes as the most traditionalist and religiously conservative. Within the framework of his interpretation, A. Demianov emphasizes the spread of eschatological and fanatical sentiments among the followers of the True Orthodox Christianity, and also emphasizes the role of the opposition-minded clergy. At the same time, the author does not offer a clear internal confessional typology of the movement, which reflects the sociologizing and ideologically normative optics of late Soviet religious studies.

It is necessary to dwell on the study that represents the church historiography of the Soviet era – the master’s thesis of Ioann (Snychev), which was defended in 1966 and published as a separate book in 1993 (Ioann (Snychev), 1993). The master’s thesis of Metropolitan Ioann (Snychev) is dedicated to the so-called right-wing schisms and represents one of the few studies that attempt to reveal the nature of the emergence of the right-wing opposition and the TOC. It was carried out within the strict framework of the Moscow Patriarchate, and therefore a significant part of the analysis presented by the author, as well as the cause-and-effect relationships and conclusions, are not always justified and are not confirmed by modern research and newly introduced sources.

The author unconditionally approved the decisions and actions of Metropolitan Sergius (Stragorodsky), unconditionally and apologetically justified them, and, if possible, kept quiet about the negative consequences for the Russian Orthodox Church of the “forced” agreement of 1927 with the God-fighting state; he characterized the actions of church leaders who took an irreconcilable position regarding the policy of the deputy patriarchal locum tenens as schismatic. For a modern researcher, the thesis is interesting because it gives a one-sided, but professional canonical analysis of the schisms that arose as a reaction to the Sergius Declaration of 1927.

In general, the Soviet historiography did not create a coherent scientific concept of the TOC, but it formed a specific discursive background and accumulated significant, albeit problematic, documentary material. It is clear that the following features are characteristic of the Soviet historiography of the TOC issue: fragmentation, ideological bias, limited source base, methodological stereotypes and attitudes. However, these studies can (and must!) be used in modern research, provided that they are treated critically, taking into account the conditions in which they were created, and the factual material presented is used in a balanced and verified manner. That is why, a critical rethinking of this heritage has become one of the key tasks of post-Soviet research.

Russian historiography. The first thorough studies on the issue of the TOC belong to the Russian researchers Mikhail Shkarovskii and Irina Osipova. Unlike the Ukrainian KGB archives, in the then Russian Federation, against the background of the development of Yeltsin's democratization, access to the archives of the special services was opened earlier, albeit to a limited extent. However, the Russian archives very rarely refused representatives of the ruling church and employees of the Memorial Society. As a result, an archivist M. Shkarovskii, who closely cooperated with the St. Petersburg Theological Academy and was an employee of the Memorial Scientific and Information Centre in 1994 – 1998, was one of the first to receive unique investigative files on the leaders of the true Orthodox movement in the first half of the 1990s. The specified materials were included in his doctoral dissertation (Shkarovskii, 1996), which was later published as an adapted and supplemented monograph, where a separate section focuses on the so-called “Josephlianstvo” (Shkarovskii, 2000, pp. 41–46), which is one of the key currents of the TOC. At the same time, quite successfully A. Kyrydon mentions the remarks of the editorial staff of the online journal “Church Bulletins” that M. Shkarovskii inappropriately and without evidence contrasts the Josephlians with the TOC and the catacombists, considering them not related to each other as church organizations (Kyrydon, 2012b, p. 40). At the same time, a qualitative start has been made to the TOC research.

Having accumulated significant material on the history of the Josephlians movement, by 1999 the researcher prepared one of the most thorough research in this area, which territorially covers not only the RSFSR, but also Ukrainian lands, which is especially valuable for domestic researchers. By involving a mass of new documents, mostly criminal cases, he managed to form a fairly reliable (if possible, given the use of documents from repressive bodies as almost the only source) and differentiated idea of the two branches of the Russian Orthodoxy in the 1920s – 1940s: “Josephlians” (TOC) – a variant of the semi-legal opposition to Sergius, which did not claim to create a parallel church centre, but was oriented towards conquering the highest church authority in the Patriarchal Church, and “True Orthodox Christianity” – a “catacomb”, illegal church that operated in the deep underground, anti-Soviet and anti-Sergius. Pointing out the clear differences between the True Orthodox Church and the True Orthodox Christianity, as two forms of development of the Russian Orthodox Church under the conditions of the establishment of a totalitarian regime, the author determined the approximate number, social composition, areas of greatest activity, and chronological framework of the existence of the aforementioned religious trends (movements) (Shkarovskii, 1999).

The author's erroneous statement, mentioned by A. Kyrydon, was his belief that the Josephlian movement chronologically ended in the 1940s, and its remnants merged with the catacombs (Shkarovskii, 1999, pp. 191–201). This is precisely the point of view held by some followers of the modern TOC, stating their position in the comments to the published section of M. Shkarovskii's monograph, which is dedicated to the history of the TOC in Ukraine (Shkarovskii, 2010)¹ (we believe that a well-known researcher and follower of the TOC, Candidate of Historical Sciences Vitalii Shumylo, spoke on behalf of the editorial board). Instead, our opinion boils down to the fact that from the point of view of Josephlian movement, as a separate trend of the TOC, M. Shkarovskii's position is quite justified, because the fundamental definition of the essence of the movement for the researcher is

¹ Nowadays, the official website of the online publication “Church Bulletin” has ceased to exist and is available exclusively in the web archive.

“an attempt by a part of the clergy and believers to find an independent (alternative to the Sergian and Catacomb) path of development in the form of legal or semi-legal opposition to the Soviet state” (Shkarovskii, 1999, p. 6). From this position, the author is absolutely right, because the post-war Josephlians no longer adhered to these provisions and completely belonged to the catacomb-type of the TOC.

As for the Ukrainian oppositionists, most of the material covers the period 1927 – 1931 and is based on a multi-volume criminal case stored in the Central Archive of Public Associations and Ukrainian Studies, which was processed by the author in sufficient detail, which enabled him to recreate the general picture of the emergence and development of the TOC in Ukraine (Shkarovskii, 1999, pp. 90–125). Later, the researcher supplemented individual details of the development of the TOC in the Ukrainian SSR/Ukrainian SSR with a number of articles on the development of true Orthodox parishes in Kyiv region, led by dean Dimitriy Shpakovskiy and Bishop Damaskin (Tsedyk) (Shkarovskii, 2011), and the post-war fate of the Ukrainian communities of the true Orthodox movement (co-authored with the Ukrainian historian Dmytro Vedeneev) (Vedeneev, & Shkarovskii, 2016a; 2016b; Shkarovskii, & Vedeneev, 2017). In addition to analytical-positivist studies, the researcher prepared quite deep biographical reconstructivist research papers, which restored the biographies of figures of the Josephlian movement (Shkarovskii, 2006; Shkarovskii, & Anashkin, 2013). These studies can serve as reference books for researchers of the history of the Russian Orthodox Church and its opposition movements.

Another pioneer in the study of the history of the true Orthodox movement is Irina Osipova, who joined the staff of “Memorial” in 1990 and began working in the archives, raising and studying the investigative and camp cases of the repressed. It was at Memorial that she found herself as a publicist, historian, researcher of archival documents and the fates of thousands of believers who suffered during the repressions (Bochkov, 2023, p. 85).

Her first substantial study was the monograph “Through the Fire of Torment and the Water of Tears... ” (Osipova, 1998), which is almost entirely based on just one criminal case, “Losiev-Novosiolov”, in which incriminating findings from various investigative cases, including the criminal case of the Ukrainian group of true Orthodox, were collected as evidence about the scale of the “counter-revolutionary” movement of the TOC. Having allocated the material from the Ukrainian SSR into a separate section, the author interpreted the history of the TOC from the standpoint of the Chekist accusation, which left an imprint on both specified fragment and the entire work as a whole. Another significant miscalculation of the monograph, which significantly affected the authority of the researcher, was the use of materials provided by the famous mythologizer of the history of the Catacomb Church, Ambrose Sievers. The latter provided I. Osipova with the use of the so-called “Novosiolov Archive”, which collected materials from the “nomadic” Councils of the Catacomb Church, which made up a significant part of the published monograph. The vast majority of modern researchers consider the works of A. Sievers and the “Novosiolov Archive” to be falsified.

Later, I. Osipova founded a book series called “New Martyrs and Confessors of Russia in the Face of God-Fighting Power”, within the framework of which 19 books were published. The authors of the books were I. Osipova and her like-minded people – Liliana Sikorskaia and Ihor Ilyich. And although the researcher did not always act as an author, she was invariably the editor of works authored by her colleagues. The vast majority of books in this series are publications of documents, excerpts, narratives of the clergy, and memoirs of believers who belonged to the TOC-True Orthodox Christianity and were subjected to repression. By 2006,

when the first restrictions were imposed on the work in Russian archives with documents of the repressed, I. Osipova studied and copied thousands of archival references, materials from camp and investigative cases, protocols, descriptions, denunciations, letters, indictments and execution lists (Bochkov, 2023, p. 87). It was these documents that formed the basis of the publications in this series.

For the Ukrainian researcher, the books that, in one way or another, provide an opportunity to reconstruct local pages of the formation and further development of the movement of the true Orthodox (and we count only two of these) are of greatest interest (Osipova, 2008; Sikorskaia & Osipova, 2022). The first collection is the memoirs of believers, which provide an idea of the internal processes in the TOC and its reception by the average adherent, and the second is the publication of materials from the 20-volume investigative case of the TOC on Ukraine in 1931, which had already been processed by both Russian and Ukrainian researchers. At the same time, the compilers focused on publishing documents of the key, in their opinion, figures in the case – bishops Pavel (Kratirov) and Iosaf (Popov), the priests Nikolai Zahorovskiy and Dimitriy Ivanov. Thus, these publications do not carry any factual novelty, but are a fairly extensive publication of primary sources, which makes the documentary heritage of the history of the Ukrainian Orthodox Church accessible and popular. The “bonus” in the publication is the republishing of materials from the book by Vinnytsia researcher Oleksandr Loginov about Bishop Vasiliy (Doktorov) (Loginov, 2012). Overall, Osipova’s works played a huge role in opening up the topic of the Catacomb Church and the TOC in the 1990s, but in modern historiography they are more often seen as the first stage of research, which was then reinterpreted by more analytical studies.

Both Russian pioneers in the study of the history of the TOC are characterized by a focus on the figures and events of the Russian eparchies, while the Ukrainian page acts exclusively as a component of the all-Russian (all-Union) movement. Their study of Ukrainian “true Orthodox” is marked by the uniformity of the source base and its limitation to Kyiv archives, which requires further researchers not only to more deeply involve materials from regional archives, but also to search for documents from the period of 1932 – 1950s, since this period has been poorly researched.

In the first quarter of the 21st century, the given issue did not lose its relevance for the Russian historical school, where the leading positions began to be occupied by the young generation of researchers, among whom Aleksey Beglov stands out (the history of the church underground of the Soviet era in all its diversity) (Beglov, 2004; 2018) and the priest Aleksandr Mazyrin (the problem of the essence of internal conflicts in the Russian Orthodox Church of the Stalin era, the reception of the 1927 Declaration and the emergence of the anti-Sergius opposition, the legality of the higher administration of the Moscow Patriarchate) (Mazyrin, 2005; 2006; Mazyrin, & Kosik, 2011). Their work makes it possible to clarify the processes that took place at the all-Union level, their driving force, the causes of conflicts in the centre, and project them onto an all-Ukrainian background.

It is interesting that these researchers represent two different historiographic schools of study of the anti-Sergius opposition and the movement of the true Orthodox. A. Beglov is a representative of the secular academic school, and A. Mazyrin is a representative of the church-Orthodox school. They are distinguished by three key points: the initial position of the researcher, the types of sources that form the basis of the study, and the research objectives. Thus, A. Beglov sets as his objective the socio-historical reconstruction of church life, based mainly on materials from state and administrative bodies, while A. Mazyrin seeks

to convey a canonical analysis of church events of the 1920s – 1930s, relying on an intra-confessional source base – letters and epistles of bishops, polemical works, decisions of church authorities, etc. (of course, most of his conclusions are drawn in the light of the official position of the Moscow Patriarchate). As a result, the evaluations, interpretations, and conclusions of these researchers differ.

In general, the Russian historiography of the issue under study has gone through, in our opinion, two key stages: the 1990s–mid-2000s – the opening of archives and the introduction into scientific circulation of materials from repressive bodies, church documents, and memoirs, which led to the accumulation of a significant amount of material and the emergence of the first academic studies; the mid-2000s – 2021 – expansion of the source base and deepening of the issues, which was accompanied by a gradual restriction of access to primary sources of repressive bodies (the Russian researchers began to increasingly use the Ukrainian source base, taking advantage of the reverse process in issues of access to the documentary heritage of the repressive bodies of the USSR). At the same time, different interpretative approaches to the scale, structure, and canonical status of true Orthodox communities and the nature of the Catacomb movement emerged in the scientific community. Nowadays, the Russian historiographic schools have entered a new stage, the watershed of which can be considered the final ban on the international society “Memorial” (2022), who provided enormous methodological and practical assistance to researchers in accessing the sources of the Soviet repressive machine. The current stage will be characterized by the limitation of Russian historians to the source base, which will lead to a certain “trampling on the spot” with a simultaneous deepening of the theoretical, methodological and source-based understanding of the problem, which we can observe nowadays (see, for example, the source-based study of O. Nuikina) (Nuikina, 2024), or the already mentioned collection of documents by I. Osipova and L. Sikorskaia (Sikorskaia, & Osipova, 2022), as an example of “trampling on the spot”).

Ukrainian historiography. In the 1990s – 2020s, the Ukrainian historiography in the study of the True Orthodox movement undoubtedly took a significant step forward. Without any exaggeration the “father” of the Ukrainian historiographical school of research on the TOC should be called Poltava researcher Volodymyr Pashchenko, who was perhaps the first to analyze the indictment in the case of the Ukrainian “branch” of the TOC in 1931 and introduced its materials into scientific circulation (Pashchenko, 1994). The researcher’s works are written in broad strokes in a positivist spirit, and a separate fragment from the history of the TOC is only a small part of the overall picture of state-church relations of the Leninist-Stalinist era, which the author created in his study.

Despite the fact that the discovery of the mentioned case belongs to a Ukrainian researcher, its detailed study was carried out by the already mentioned M. Shkarovskii and I. Osipova, who for many years was repelled by secular researchers of church history of the interwar period. To date, the aforementioned case, which has already been supplemented with additional volumes and consists of 23 storage units, has not yet been fully introduced into scientific circulation. Researchers use its materials sparingly when examining individual episodes of the history of the TOC-True Orthodox Christianity in a biographical or regional context (see, e.g., the article by Trygub, & Bazhan (2026)). This is the nature of the studies of the first decade of the 21st century, which are dedicated either to individual figures of the TOC (Lavrentiy (Proskura), Pavel (Kratirov), Varsonofiy (Yurchenko), Petr (Ladygin), etc.), or to the state-church issues of individual regions of Ukraine (Donetsk, Kharkiv, Kyiv,

etc.). Therefore, we will consider individual studies of the Ukrainian researchers as they are published.

One of the first systematic researchers of the TOC history were Chernihiv followers of this creed, Vitaliy and Serhiy Shumylo. In 2001, V. Shumylo published a popular science brochure with a hagiographic essay about the schiarchimandrite Lavrentiy (Proskura) (Shumylo, 2001), which was based on archival documents and eyewitness memories. As the author wrote in the preface to his scientific publication about Fr. Lawrence later: “The disadvantage of it [the study of 2001] is that it was written in a popular science style and was more of a popularizing than a scientific nature” (Shumylo, 2019). At the same time, a persistent study on finding primary sources enabled V. Shumylo to do a thorough and maximally complete hagiographic research on Father Lawrence.

In 2011, S. Shumylo published a synthetic study (Shumylo, 2011), in which there is expressed the author’s vision of the history of the TOC and, to some extent, occupies an intermediate position in historiography between scientific research and confessional journalistic exposition, as evidenced by the term “notes” used by the author in the title. According to the author’s intention, the study is a generalizing synopsis of the history of the catacomb movement, which sequentially examines the stages of the underground church existence – from the persecutions after 1917, the catacomb communities formation and their development in the 1930s – 1950s to the situation in the 1980s – early 1990s. The author seeks to explain the reasons for the transition of part of the Orthodox clergy and laity into the underground and to trace the formation history of the so-called True Orthodox (Catacomb) Church in the USSR. In essence, this study can be described as a generalizing confession-oriented attempt to present the history of the Catacomb movement, which popularizes a certain interpretation of the True Orthodox Church history and, at the same time, reflects the view of the environment associated with the Catacomb tradition. We completely agree to the conclusion of A. Kyrydon regarding this study, which concluded that “the author’s considerations only actualize the need for further study of the causes of the emergence, nature and character of the TOC and the relationship between the concepts of the TOC and the True Orthodox Christianity” (Kyrydon, 2012b, p. 44).

Later, V. Shumylo published a number of articles that were linked in one way or another to the development of the TOC in Chernihiv region and, first of all, revealed little-known biographical pages of its leading figures – Bishop Damaskin (Tsedrik) (Shumylo, 2015; 2016), Abbot Alipii (Yakovenko) (Shumylo, 2020a), Archbishop Pakhomiy (Kedrov) (Shumylo, 2020b), a layman and ideologist of the TOC Sergiy Nilus (Shumylo, 2021a), etc.

The result of the researcher’s study was a PhD dissertation that reveals the history of the true Orthodox movement in Chernihiv region during the interwar period (Shumylo, 2021b). Despite the undeniable positive aspects of the study (an insider’s view, a rich source base, an understanding of the internal nature of the catacomb movement), it is not without its own shortcomings. For example, the author mostly operates with materials from Chernihiv communities of the TOC, and the territories of other districts and regions are deprived of the researcher’s focus. Important aspects of social history were left out of researcher’s focus – a general portrait of a true Orthodox believer, the number of communities, its gender, educational, property, etc. cross-section.

Speaking about the regional aspect of studying the TOC, it is necessary to recall the works of O. Loginov (Loginov, 2007; 2012) (Vinnytsia region), S. Bilokin (Kyiv) (Bilokin, 2008), M. Mykhailutsa (Odesa region) (Mykhailutsa, 2002; 2012a; 2012b; Mykhailutsa, &

Trygub, 2020), O. Trygub (Mykolaiv and Kherson regions) (Trygub, 2009c; 2013; 2019) and O. Forostiuk (Donbas) (Forostiuk, 2000; 2001). All authors base their research on archival and investigative materials on supporters and ascetics of the TOC. In the historiographical context, these studies can be characterized as local studies of individual movements and groups of the religious underground, which complement general studies on the True Orthodox Church, but do not claim to create a general concept of the history of the Catacomb movement. They are important primarily because they introduce new archival materials into scientific circulation and demonstrate regional features of the existence of the religious underground. For example, the studies of Oleksandr Loginov, based on materials from the archives of special services and local archives of Vinnytsia region, reconstruct the activities of one of the groups of the religious underground of Podillia – the “Ioannites”, tracing their formation, social composition, ideological features and mechanisms of repressive persecution by the Soviet authorities. A special merit of the researcher is the discovery of the criminal case of Bishop Vasiliiy (Doktorov), the last years of whose life remained a blank spot in historical science.

We should dwell on the studies of Oleksandr Trygub, which are of a pan-Ukrainian nature (Trygub, 2009a; 2009b; 2009d). In particular, A. Kyrydon, characterizing the scholar’s scientific achievements in the field of studying the history of the TOC, noted: “In the Ukrainian historiography of church history, the position of the TOC was outlined by O. Trygub the most thoroughly. Summarizing the existing approaches to the characterization of the TOC, the researcher emphasized the conventionality of the term TOC and suggested using another one – “anti-Sergius opposition””, insisting on the conventionality of the term “True Orthodox Church”. “...O. Trygub’s merit is an attempt to characterize the activities of regional religious groups of the TOC movement in the 1920s and 1930s” (Kyrydon, 2012b, p. 42). In turn, V. Shumylo noted: “Oleksandr Trygub’s thorough research is valuable due to the published archival documents and the clear chronology formed by the author. The studies of this researcher are characterized by objectivity, non-involvement in certain church politics and confessionalism” (Shumylo, 2021b, pp. 31).

The last decade was marked by the publication of a number of studies by Dmytro Vedenev (including the already mentioned studies co-authored with M. Shkarovskii), which are based on declassified materials from the Branch State Archive of the Security Service of Ukraine (Vedenev, 2017). In the monograph “Atheists in Uniforms...” (Vedenev, 2016, pp. 310–366), the author analyzed the history of the TOC in Ukraine through the prism of the activities of the Soviet special services, describing the operations of the OGPU-NKVD-MGB-KGB bodies against the religious underground, including the “church-monarchical underground” and communities of the True Orthodox Church, which were the object of agent development and repression. The merit, and at the same time the drawback, of the researcher is his complete reliance on archival documents of an operational nature, which create a false reception of the true Orthodox movement through the prism of the Chekist view. The author’s focus is not on a comprehensive reflection of the development of the denomination, but, first of all, on the forms of underground activity of communities, methods of their detection and liquidation, as well as on the mechanisms of operational work of state security bodies. After the monograph was published, the author posted most of its materials on the website www.pravlife.org, which significantly increased the readership of his materials. It is interesting that in his studies D. Vedenev is distinguished by his sharp and sometimes contemptuous rejection of opposition Orthodox movements, positioning himself as a supporter of the Moscow Patriarchate.

The Ukrainian historiography is not limited to the above-mentioned researchers, as certain aspects of the TOC issues have been (and are being) studied by Liudmyla Shuhaieva, Oleksandr Ihnatushya, Petro Bondarchuk, Tetiana Vahramenko, and the others. Of course, the development of Ukrainian historiography in the field of studying the history of the True Orthodox Church, the Catacomb Church, the movement of True Orthodox Christians, and in general, church resistance and the Orthodox underground requires separate research, deeper study, and broader coverage.

Conclusions. The analysis of the True Orthodox Church historiography shows that the study of this complex phenomenon was formed gradually and unevenly, depending on political conditions, the availability of source material, and the methodological guidelines of historical science. The Soviet historiography did not actually recognize the TOC as a separate church phenomenon and viewed underground Orthodox groups mainly through the prism of the state's anti-religious policy. It was characterized by ideological bias, a limited source base, and an interpretation of the movement as a socially reactionary or sectarian phenomenon. At the same time, the studies of Soviet authors have accumulated significant empirical material – the results of field research, statistical data, and some archival information, which, after critical rethinking, remain an important source for modern research.

A new stage in the study of the TOC began after the opening of the archives in the 1990s. The Russian researchers M. Shkarovskii and I. Osipova introduced into scientific circulation a significant array of documents of the repressive bodies and initiated a systematic study of the Catacomb/Josephlian movement. Their studies made it possible to outline the structure, geography and social composition of true Orthodox communities, although they focused mainly on the Russian regions. Further research, in particular the studies of A. Beglov and A. Mazyrin, demonstrated the formation of different methodological approaches – secular academic and church-confessional, which led to the emergence of different interpretations of the nature and scale of the movement.

The Ukrainian historiography has been active since the 1990s and has gradually formed its own research tradition. A significant contribution to the development of this issue was made by V. Pashchenko, the Shumylo brothers, S. Bilokin, O. Trygub, D. Vedenev and other researchers. Their works are based mainly on archival and investigative materials and are partly regional in nature, which enables us to reconstruct the local features of the existence of underground Orthodox communities in Ukraine. At the same time, to this day, historiography lacks thorough works of a pan-Ukrainian nature.

In general, the modern historiography of the TOC demonstrates a transition from ideologized and fragmentary interpretations to a more comprehensive analysis that takes into account the socio-cultural context and the diversity of forms of the religious underground. At the same time, the problem remains insufficiently researched: a significant part of the sources has not yet been introduced into scientific circulation, and regional studies need to be generalized. Further research should be aimed at expanding the source base, clarifying the conceptual and terminological apparatus, and creating synthetic works that will focus on a holistic reconstruction of the history of the True Orthodox Church in the context of church life in the Soviet era.

We can say that the Ukrainian historical science is currently at the final stage of accumulating an empirical archival mass and soon, owing to the Ukrainian archival revolution of the last decade (comprehensive access to documents of special services with the simultaneous development of the digitalization of documentary heritage), we can expect the appearance of qualitatively new studies on the stated issues.

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Anatoliy KALYAEV

PhD (History), PhD hab. (Public Administration), Professor, Head of the Department of Humanities, Hetman Petro Sahaidachny National Academy of Land Forces, 32 Heroiv Maydanu Street, Lviv, Ukraine, postal code 79026 (toldek@ukr.net)

ORCID: 0000-0002-5675-187X

Sergii MARKIN

PhD (Law), Doctoral Student, Uzhhorod National University, 14 Universytetska Street, Uzhhorod, Ukraine, postal code 88000 (advokat_markin@ukr.net)

ORCID: 0009-0008-0410-1702

Анатолій КАЛЯЄВ

кандидат історичних наук, доктор наук державного управління, професор, завідувач кафедри гуманітарних наук, Національна академія сухопутних військ імені гетьмана Петра Сагайдачного, вул. Героїв Майдану, 32, м. Львів, Україна, індекс 79026 (toldek@ukr.net)

Сергій МАРКІН

кандидат юридичних наук, докторант ДВНЗ “Ужгородський національний університет”, вул. Університетська, 14, м. Ужгород, Україна, індекс 88000 (advokat_markin@ukr.net)

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**HISTORIOGRAPHY OF THE STUDY OF THE STAGES OF DEVELOPMENT
OF ADMINISTRATIVE JUSTICE AS AN INSTRUMENT FOR THE PROTECTION
OF HUMAN AND CIVIL RIGHTS AND FREEDOMS IN UKRAINE
(THE 20th – EARLY 21st CENTURY)**

Abstract. *The purpose of the research is to analyse the state and characteristics of the historiographical study of administrative justice development of as a means for the protection of human and civil rights and freedoms in Ukraine in the 20th and the beginning of the 21st centuries. The methodology of the research is based on the principles of historicism, objectivity and scientific systematicity. There have been used historical comparative, historical genetic, problem chronological, historiographical and systematic methods. Scientific novelty: the evolution of scholarly views on the development of administrative justice is traced, common and different approaches to its periodization are identified, and the main trends in research on the issue are determined. Conclusions. It has been determined that the contemporary historiography has generally formed a coherent understanding of the administrative justice development in Ukraine. The majority of scholars distinguish the pre-Soviet*

stage, associated with the functioning of administrative and judicial institutions within the Russian and Austro-Hungarian Empires; the period of the Ukrainian Revolution of 1917 – 1921; the Soviet period; and the stage of independent Ukraine. It has been demonstrated that the origins of the administrative justice date back to the second half of the 19th century, when the first mechanisms of the judicial control over the administrative authorities began to emerge under the influence of the European legal models. The state-building processes of 1917 – 1921 played a particularly significant role in the administrative justice development, while the final stage of its institutionalisation was marked by the establishment of a system of the administrative courts following Ukraine's independence and the adoption of the Code of Administrative Procedure of Ukraine in 2005. At the same time, it has been determined that the issues concerning the regional specificities of the administrative justice development, the influence of the European legal traditions on the Ukrainian model of administrative adjudication (proceedings), and the evolution of scholarly approaches to its role in the mechanism for protecting of human and civil rights and freedoms remain studied insufficiently.

Key words: administrative justice, administrative adjudication, historiography, protection of human and civil rights and freedoms, administrative courts, judicial review, Ukraine, modern period.

ІСТОРИОГРАФІЯ ДОСЛІДЖЕННЯ ЕТАПІВ РОЗВИТКУ АДМІНІСТРАТИВНОГО СУДОЧИНСТВА ЯК ІНСТРУМЕНТУ ЗАХИСТУ ПРАВ І СВОБОД ГРОМАДЯН В УКРАЇНІ (XX – початок XXI ст.)

Анотація. Метою дослідження є розкриття стану та особливостей історіографічного вивчення розвитку адміністративного судочинства як інструменту захисту прав і свобод громадян в Україні протягом XX – на початку XXI ст. та систематизація наукових підходів до періодизації його становлення. **Методологія дослідження** ґрунтується на принципах історизму, об'єктивності та наукової системності. Використано історико-порівняльний, історико-генетичний, проблемно-хронологічний, історіографічний та системний методи. **Наукова новизна:** простежено еволюцію наукових поглядів на розвиток адміністративного судочинства, виявлено спільні й відмінні підходи до його періодизації та визначено основні тенденції дослідження проблеми. **Висновки.** Встановлено, що сучасна історіографія сформувала загалом цілісне бачення розвитку адміністративного судочинства в Україні. Більшість дослідників виокремлюють дорадянський етап, пов'язаний із функціонуванням адміністративно-судових інституцій Російській та Австро-Угорській імперіях, період Української революції 1917–1921 рр., радянський період та етап незалежної України. Доведено, що витоки адміністративного судочинства сягають другої половини XIX ст., коли під впливом європейських правових моделей почали формуватися перші механізми судового контролю за діяльністю адміністрації. Особливе значення для розвитку адміністративної юстиції мали державотворчі процеси 1917–1921 рр., а завершальним етапом її інституціоналізації стало створення системи адміністративних судів після здобуття Україною незалежності та прийняття Кодексу адміністративного судочинства України у 2005 р. Водночас з'ясовано, що недостатньо дослідженими залишаються питання регіональної специфіки розвитку адміністративної юстиції, впливу європейських правових традицій на українську модель адміністративного судочинства та еволюції наукових підходів до його ролі в механізмі захисту прав і свобод громадян.

Ключові слова: адміністративне судочинство, адміністративна юстиція, історіографія, захист прав і свобод громадян, адміністративні суди, судовий контроль, Україна, модерна доба.

Problem Statement. The administrative justice is one of the key mechanisms for ensuring the rule of law and the protection of human and civil rights and freedoms in relations with the state authorities and local self-government bodies. Its formation and development in Ukraine occurred under the influence of complex political, legal, and social transformations spanning various historical stages of the 20th and the beginning of the 21st centuries. Due to the absence of a distinct system of administrative justice during the Soviet period, a gradual formation of the mechanisms for the judicial oversight of the public authorities' activities during the period

of independence, and the establishment of a specialized system of administrative courts, there was a considerable interest regarding the issues on the administrative proceedings among scholars.

Despite the fact that there was a considerable body of academic studies on the history of administrative justice, the judicial system reform and the protection of human rights in public law relations (Kazan, & Maliuk, 2025; Maliuk, & Skorych, 2024; Vyhivskiy, & Ondriash, 2025), the issue on the historiographical understanding of the stages of administrative justice development in Ukraine remains studied insufficiently comprehensively. The published studies are predominantly focused on specific periods, legislative changes or institutional aspects of administrative courts functioning, whilst the evolution of scholarly approaches to understanding the role of the administrative justice as an instrument for the protection of human rights and freedoms requires generalisation and systematisation.

In this regard, it is pertinent to conduct a historiographical analysis of the academic research on the administrative justice development in Ukraine, to identify the main directions, trends and characteristics of how its stages are covered in the academic literature, and to determine the extent to which the issue has been studied in contemporary legal and historical legal science. At the same time, it is necessary to take into account theoretical and methodological works on the construction of periods and stages of historical processes (Haliv, & Ilnytskyi, 2024), respectively, theoretical argumentation for demonstrating the historical development of legal and public institutions (Ilnytskyi, & Haliv, 2022; Kurylyshyn, & Haliv, 2024).

The purpose of the research is to analyse the state and characteristics of the historiographical study of administrative justice development of as a means for the protection of human and civil rights and freedoms in Ukraine in the 20th and the beginning of the 21st centuries.

The Research Results. It is necessary, first and foremost, to highlight those works that cover the historical context of the administrative justice formation (on the backdrop of the general evolution of administrative justice in Ukraine) among the published historiographical studies.

Hence, N. Pysarenko, in her study, made an attempt to reconstruct the history of administrative justice development in Ukraine during the modern era (focusing, prior to the events of the Ukrainian Revolution of 1917 – 1921, solely on Naddniproshchyna (Dnieper) region) and to identify several stages within it. According to the author, the first elements of administrative justice in the Ukrainian lands emerged during Ukraine's initial period as part of the Russian Empire, spanning the second half of the 19th century to 1917. At that time, the administrative and legal disputes were heard by hubernia (provincial) councils and the Senate, which acted as the highest administrative court effectively. However, the above-mentioned system was incomplete: due to the absence of clear procedural rules, the vagueness of the authorities' jurisdiction, and its dependence on the executive branch, it significantly limited the possibility of the effective protection of citizens' rights. The Provisional Government made attempts to reform the administrative justice in 1917, envisaging the creation of the specialised administrative courts; however, due to the revolutionary events, these were not implemented.

The second stage coincided with the period of the Ukrainian Revolution of 1917 – 1921, when, as N. Pysarenko argued that the idea of administrative justice was further developed. The constitutional and legislative drafts of the Ukrainian People's Republic and the Ukrainian State provided for the creation of the specialised bodies to hear the administrative cases. However, the Soviet power establishment altered the course of development, marking the beginning of the third stage – in the 1920s, separate mechanisms for considering citizens' complaints against the actions of administration still existed, but the creation of

an independent administrative judiciary was abandoned gradually. Instead, the priority was given to the administrative control and the internal departmental appeals.

Over the following decades, the Soviet command-and-control system effectively precluded meaningful judicial oversight of the authorities' activities. At the same time, there was a gradual expansion of judicial protection of citizens' rights from the late 1950s onwards, marking the beginning of the fourth stage. The codification of the procedural legislation, the establishment of the right to judicial review of certain administrative decisions, and the constitutional recognition of citizens' right to bring legal proceedings against the officials for unlawful acts were of utmost importance. It was during this period that academic debates intensified regarding the nature of administrative justice and the need to expand the judicial oversight in the sphere of public administration.

The fifth stage began in the late 1980s and was a qualitatively new stage, linked to the legislative formalisation of citizens' right to judicial review of the actions and decisions of public administration bodies. The relevant legislative acts (such as the Soviet Law of 30 June 1987 "On the Procedure for Challenging in Court Unlawful Actions and Decisions of Officials that Restrict Citizens' Rights", and the USSR Law of 2 November 1989 "On the Procedure for Challenging in Court Unlawful Acts of State Administrative Bodies and Officials that Restrict Citizens' Rights") created the legal foundations for the formation of modern system of the administrative justice, although their scope remained limited. In general, the administrative justice development of in Ukraine prior to independence was characterised by a gradual expansion of the judicial guarantees for the protection of citizens' rights, but without the establishment of specialised administrative courts. It was precisely this historical experience that laid the foundation for the subsequent formation of administrative justice in independent Ukraine as a vital instrument for safeguarding human rights and freedoms (Pysarenko, 2002).

O. Svyda also identified several stages in the development of administrative courts in Ukraine. Thus, according to the scholar, the pre-Soviet period (regarding Soviet Ukraine) spanned the time from the elements' emergence of administrative justice to the revolutionary events of 1917. The scholar further identified three stages within the above-mentioned period: the period prior to the judicial reform of 1864, when the judiciary was not yet separated from the administration; the period from 1864 to the February Revolution of 1917, when the so-called "prysutstviia" bodies emerged, combining administrative and judicial functions, and the academic research into the models of administrative justice intensified; and, finally, the period between the February and October Revolutions of 1917, when the practical establishment of the specialised administrative courts began.

In the western Ukrainian lands, which were part of the Habsburg Monarchy, the administrative justice development followed the Austrian model. There were established the mechanisms for the judicial oversight of administrative activities gradually there, from the adoption of the 1867 Constitution until the outbreak of World War I. At the same time, during the period of the Ukrainian Revolution of 1917 – 1920, the issue on establishing the administrative courts remained largely at the level of the draft laws and concepts, which, due to the political instability, were never implemented fully.

The Soviet period, in the scholar's view, was characterised by an ambivalent attitude towards administrative justice. In the 1920s, there were ongoing discussions among the scholars under the New Economic Policy (NEP) regarding the need to establish the administrative justice as an independent institution. However, in the 1930s and early 1950s, this idea was effectively rejected as contrary to the principles of the socialist state. It was

only from the mid-1950s to the late 1980s, on the backdrop of a certain liberalisation of the political regime, that interest in the issues on the administrative justice gradually revived, although there were never established the specialised administrative courts.

The current stage of the administrative justice development began in the late 1980s. Its first period, which lasted until the adoption of the 1996 Constitution of Ukraine, was characterised by the democratisation of society, the expansion of judicial protection of citizens' rights, and active discussion of the need to establish administrative courts. The second stage began with the adoption of the Constitution of Ukraine, which enshrined the principles of specialisation within the judicial system and guarantees of the judicial protection of human rights. It was on this basis that modern system of administrative courts in Ukraine was gradually formed, becoming an integral part of the mechanism for ensuring the rule of law and the oversight of public authorities (Svyda, 2008, pp. 7–8).

V. Bevzenko also identified similar stages in the 20th century, he distinguished periods in the functioning of the administrative justice in Ukrainian lands according to the geopolitical realities in which they existed: 1) the era of the Russian and Austro-Hungarian Empires (up to 1917 – 1918); 2) the period of the Ukrainian statehood formation (1917 – 1921) – the era of the Central Rada, the Hetmanate and the Ukrainian People's Republic; 3) the period of political emigration by the Government of the Ukrainian People's Republic in exile (from 1920 to 1992); 4) Ukraine during its time as part of the USSR (1922 – 1991); 5) independent Ukraine (from 1991 to the present) (Bevzenko, 2013, pp. 56–57).

V. Reshota offered the following stages in the development of the institution of administrative justice in modern history of Ukraine: 1) 1864 – 1917: the formation of judicial and administrative bodies for resolving disputes in the sphere of public administration, and the publication of fundamental studies on the issues of administrative justice; 2) 1917 – 1920: projects to establish the administrative justice during the formation of independent Ukrainian state; 3) 1920 – 1991: the decline and rejection of the institution of administrative justice in the public administration of the Soviet Union; 4) 1991 – 2005: the establishment and development of the administrative justice in Ukraine; 5) from 2005 to the present day – the formation and development of the administrative justice (Reshota, 2015, pp. 124–125).

Furthermore, in analysing the preconditions for administrative justice formation in Ukraine, the researcher also focused primarily on the relevant experience within the Russian Empire and the USSR. Thus, according to him, whilst administrative justice began to form in Western European countries as early as the 18th – 19th centuries, interest in the administrative justice arose much later in the Russian Empire – only in the second half of the 19th century. Following the judicial reform of 1864, individual elements of a system for resolving disputes between the citizens and the public authorities began to emerge. However, a fully-fledged administrative justice system in the modern sense did not exist. There were heard complaints by the general courts, magistrates and special administrative bodies, and the system itself remained fragmented, lacking a clear structure and proper procedural regulation.

There was formed a distinctive model for resolving administrative and legal disputes in the Russian Empire at the end of the 19th and at the beginning of the 20th centuries. It was based on provincial “prysustviiia” – special quasi-judicial bodies consisted of the officials and representatives of the local self-government, as well as the First Department of the Senate as the highest instance. Despite a certain degree of specialisation and the presence of features of the administrative proceedings, this system had numerous shortcomings: an unclear division of powers, dependence on the administration, a lack of adversarial proceedings and

transparency, as well as delays in the consideration of cases. At the same time, it was during this period that academic research into the administrative justice was actively developing and proposals for its reform were being discussed.

The events of 1917 – 1920 marked an important stage, when, within the context of the Ukrainian statehood, the issue on the administrative justice received significant attention. The Constitution of the Ukrainian People's Republic and legislative proposals from the periods of the Hetmanate and the Directory provided for the establishment of the specialised administrative courts and the separation of administrative power from the judicial power. There were plans to introduce a multi-tiered system of the administrative justice, which was intended to ensure oversight of the legality of government actions and protection of citizens' rights. However, due to the political instability and the Bolsheviks' rise to power, these projects were not implemented.

There ceased the development of the administrative justice during the Soviet period. The Bolshevik authorities rejected the very idea of a conflict between the citizen and the state, so there were not established any specialised administrative courts. The protection of citizens' rights was carried out primarily through administrative procedures, supervisory bodies, public prosecutor's office and people's courts. It was only in the 1970s and 1980s that the right of citizens to challenge the actions of the officials and the administrative bodies in court was gradually enshrined. Thus, as V. Reshota summarised, the administrative justice development in Ukraine was complex and uneven: from the first quasi-judicial institutions of the Russian Empire, through the unrealised projects of the UNR era, to the prolonged period of the Soviet rejection of this institution. The real conditions for its full-scale development arose only after Ukraine's declaration of independence (Reshota, 2015, pp. 125–127).

P. Lepisevych employed a similar division into stages with analogous periodisation in his work. The scholar concluded while summarising the evolution of administrative justice in Ukraine that, at the present stage, the development of market relations has facilitated a clear distinction between private-law relations among economic entities and public-law relations between them and state authorities, and consequently, the institution of administrative justice gained significance as a mechanism for the legal protection of the rights, freedoms and legitimate interests of natural and legal people in their relations with public authorities. Administrative justice constitutes a comprehensive system of legal remedies and procedures aimed at ensuring effective judicial review of decisions legality, actions or omissions by public authorities. Its systemic nature requires proper regulatory framework for the principles, forms and mechanisms of protection, as well as the definition of the scope of subjects and objects of the legal protection. At the same time, effective judicial protection in the sphere of the public law relations is one of the key elements of the rule of law, as it ensures that the activities of public authorities are reviewed for compliance with the law, that well-founded and fair judicial decisions are made, and guarantees their enforcement within a reasonable timeframe, which serves as an important prerequisite for the effective protection of human and civil rights (Lepisevych, 2024).

I. Hrytsenko made a similar argument. In particular, the scholar noted that in the second half of the 19th – the beginning of the 20th centuries, the institution of administrative justice in the Russian Empire (to which most of the Ukrainian territories belonged) was still very imperfect – for example, there was no coherent system of the administrative courts, and the practice whereby disputes between citizens and authorities were considered by administration itself was ineffective. At that time, the functions of administrative justice were performed by

the *hubernia prysutstva* and the First Department of the Senate; however, their activities were characterised by a lack of clear procedural rules, insufficient independence, and the involvement of the representatives of the administrative apparatus in the consideration of cases. As a result, the administrative justice often became not a mechanism for protecting rights, but a tool for supporting the ruling structures. Despite this, the revolutionary events of 1905 and the adoption of the Fundamental Laws of the Russian Empire in 1906 intensified academic discussions regarding the need to establish specialised administrative courts and strengthen the oversight of state administrative bodies' activities.

Furthermore, according to I. Hrytsenko, during the period of the Ukrainian Revolution of 1917 – 1920 and the existence of the Ukrainian state formations, there were made attempts to establish a separate system of administrative justice. The 1918 Constitution of the Ukrainian People's Republic (UNR), the legislation of the Hetmanate, and the draft of the UNR's Fundamental State Law during the Directorate era provided for the judicial oversight of the legality of the administrative bodies' actions and even the establishment of a Supreme Administrative Court. And although the above-mentioned projects were not fully implemented due to the political instability, they demonstrated the Ukrainian lawyers' desire to introduce the European model of the administrative justice. During the Soviet period, the idea of the administrative courts remained unrealised for a long time due to the dominance of the administrative command system, although there continued to exist individual draft laws and academic studies. It was only at the end of the 20th century, following Ukraine's declaration of independence, that the conditions were created for the formation of modern system of administrative justice, which was enshrined in the Constitution of Ukraine, the Law "On the Judicial System of Ukraine" and the Code of Administrative Procedure (CAP) of Ukraine (Hrytsenko, 2019).

However, M. Bulkat emphasised that the adoption of the Code of Administrative Procedure should not, in itself, be regarded as a definitive solution to the issue regarding protecting human rights and freedoms in the sphere of public administration. According to the scholar, it is necessary to improve the system of public administration consistently in such a way as to minimise the possibility of bureaucratic arbitrariness alongside the introduction of effective judicial mechanisms for challenging the actions and decisions of public authorities. The scholar emphasised that the priority should be not only to ensure the judicial protection of violated rights, but also to create legal and organisational conditions that would prevent the adoption of unlawful decisions, the commission of unlawful acts or inaction on the part of public administration bodies and their officials (Bulkat, 2023, p. 78).

At the same time, V. Pchelin noted that the Code of Administrative Procedure of Ukraine incorporated the fundamental conceptual principles of the judicial protection of human rights and freedoms in the sphere of public law relations. In the scholar's opinion, the provisions of the Code were aimed at ensuring comprehensive, all-round and effective protection of the citizens' subjective rights against possible violations by public administration bodies and their officials. The scholar emphasised that the Code of Administrative Procedure of Ukraine established appropriate procedural mechanisms for the realisation of the right to the judicial protection, ensuring the possibility of a full and impartial consideration of the administrative disputes and strengthening guarantees of legality in public authorities' activities (Pchelin, 2017, p. 35).

There were diverse scholars, who conducted a historical and legal analysis of the administrative justice development in Ukraine, for example, R. Myhal, I. Zakharchuk, M. Blonskyi, D. Melnyk and V. Liubchynskyi, who emphasised that the foundation upon

which the restored Ukrainian statehood was based during the 1917 – 1921 revolution had been formed in the 19th–20th centuries within the legal systems of the Russian and Austro-Hungarian empires, of which the Ukrainian territories were a part at that time.

As the scholars argued, the first elements of the administrative justice existed as early as in the Muscovite state in the form of the Cholobitnyi Order (Prykaz), which considered the complaints against the officials and supervised the activities of the authorities. In the 18th and the first half of the 19th centuries, these functions were transferred to the Senate and the Public Prosecutor's Office of the Russian Empire, which exercised supervisory powers over the legality of officials' actions.

Western European legal models, primarily French and German, had a decisive influence on the administrative justice development. Following the judicial reform of 1864, the idea of the judicial oversight of the administration rooted in the Russian Empire gradually. In *hubernias* (provinces), particularly in the Ukrainian lands, special judicial administrative “*prysutstviia*” were established to hear the citizens' complaints about local authorities. Although they performed certain functions of the administrative justice, their activities remained closely linked to the administrative apparatus and did not comply with judicial independence principle (Myhal, Zakharchuk, Blonskyi, Melnyk, & Liubchynskyi, 2023).

According to scholars, the First Department of the Senate served as the highest instance of the administrative justice in the Russian Empire. However, it was not a fully-fledged administrative court in the modern sense, as it was under significant influence from government bodies, and the procedure for appointing senators did not guarantee their professional legal competence or independence. Despite there were made several attempts in order to reform at the beginning of the 20th century, in particular, P. Stolypin's projects and the legislative changes of 1916 – 1917, there was not completed the creation of a comprehensive system of administrative courts in the Russian Empire successfully.

At the same time, as the authors noted, in the western Ukrainian lands that were the part of the Habsburg Monarchy, the administrative justice development followed a different model. The constitutional reforms of 1867 enshrined the principle of the judicial independence, and the 1875 Act defined the status of the Supreme Administrative Court. *Povit* (county) and *Krajowy* (regional) courts were granted the right to review the legality of the administrative acts, and in 1914 the *Krajowy Administrative Tribunal* was established in Galicia. Consequently, the Austrian system was far more in line with the European standards of the judicial review of administration.

According to the scholars, a new stage in the administrative justice development is linked to the Ukrainian state-building processes of 1917 – 1920. The Central Rada, Pavlo Skoropadskyi's Hetmanate and the Directory of the Ukrainian People's Republic (UPR) consistently supported the idea of establishing the administrative courts. The administrative departments operated within the structure of the General Court and the State Senate, whilst draft constitutional acts provided for the creation of a separate Supreme Administrative Court. Hence, the Ukrainian governments sought to lay the foundations for an independent system of administrative justice as a mechanism for protecting citizens' rights against unlawful actions by the state bodies.

After the Soviet rule establishment, there was halted the administrative courts development effectively. Despite some academic debates and proposals to establish administrative courts in the 1920s, the Soviet legal system favoured prosecutorial oversight and administrative control. The idea of administrative justice was long regarded as incompatible with the Soviet

model of the state. It was only after Ukraine regained its independence in 1991 that the issue on the establishing the administrative courts became relevant again, ultimately leading to the formation of modern system of administrative justice as one of the key instruments for the protection of human and civil rights and freedoms (Myhal, Zakharchuk, Blonskyi, Melnyk, & Liubchynskyi, 2023).

O. Korchynskyi drew attention to the historical preconditions among other things, while he was studying the legal foundations of administrative justice organisation in Ukraine. Thus, the scholar noted that the first institutions emerged to consider citizens' complaints against the actions of officials, and the theoretical foundations of the administrative justice were formed as a means of controlling the activities of the state administration and protecting the individual rights at the beginning of the 20th century, in the context of the administrative law development under the Russian and Austro-Hungarian empires.

An important milestone for the part of Ukraine under Russian rule came in 1917, when the Russian Provisional Government adopted legislation on the administrative courts and introduced a three-tier system for the adjudication of administrative disputes. There happened similar processes in the Ukrainian state formations of the 1917 – 1921 revolutionary period (the UNR, the Ukrainian State, and the ZUNR). As an example, O. Korchynskyi cites the fact that on 12 December 1917, the Secretariat of Judicial Affairs submitted to the Central Rada a draft law on the establishment of a provisional General Court, which became the highest judicial body in accordance with the Constitution of the Ukrainian People's Republic of 28 April 1918. The scholar emphasised that, alongside the civil and criminal departments, the General Court also included an administrative department (Korchynskyi, 2018, pp. 49–57).

However, the Soviet power establishment led to the abolition of the previous judicial system and abandonment of independent administrative justice. Despite this, there carried on the academic debates regarding the necessity of judicial oversight of administration during the Soviet period, and a gradual expansion of citizens' rights to challenge public officials' actions laid the groundwork for future reforms. After proclaiming independence, Ukraine began the phased creation of its own system of administrative justice. The key milestones included the 1992 Concept of Judicial and Legal Reform, the 1996 Constitution of Ukraine, the 2002 Law "On the Judicial System of Ukraine", and the adoption of the Code of Administrative Procedure in 2005. As a result, the administrative courts became a separate and fully-fledged branch of judicial system, designed to ensure effective protection of human rights against unlawful decisions, actions or omissions by the state authorities and local self-government bodies. In general, as the it was concluded by the scholar, the administrative justice development in Ukraine reflects a combination of the national legal experience and the European traditions. Each historical stage has contributed to the formation of modern model of administrative justice, which today serves as a vital instrument for the realisation of the rule of law and a guarantee of the protection of citizens' rights in their relations with the state (Korchynskyi, 2018, pp. 57–61).

In addition, R. Onysko also made similar arguments in his research. The scholar also argued that the first elements of control over the activities of authorities in the Ukrainian lands that were part of the Russian Empire were formed through a system for considering complaints about the officials, and from the second half of the 19th century, under the influence of the European reforms, special bodies for considering administrative disputes began to appear. The judicial reform of 1864 initiated the separation of judiciary from administration and brought the issue on the oversight of local self-government bodies. At the

same time, *hubernias* “*prysutstviia*” and the First Department of the Senate did not ensure full and independent administrative justice, as they were under the significant influence of the bureaucratic apparatus and did not guarantee the principles of adversarial proceedings, openness and procedural equality of the parties.

At the beginning of the 20th century, the need to reform administrative justice became even more apparent. There were drawn up plans to establish specialised administrative courts, and following the revolutionary events of 1917, a law on administrative courts was passed, which for the first time introduced the system of administrative courts as separate bodies to adjudicate disputes between the citizens, government bodies and local authorities. Although the above-mentioned reforms were not fully implemented due to the political instability, they marked an important stage in the development of the idea of judicial oversight of administration and the protection of citizens’ rights against abuses of power.

The administrative justice developed in line with the Austrian legal tradition in the western Ukrainian territories that were part of Austria-Hungary. Constitutional reforms in the second half of the 19th century ensured the independence of the judiciary and granted courts the right to review the legality of administrative acts. There were also plans to establish specialised administrative tribunals, but their implementation was interrupted by World War I. Despite this, the Austrian model contributed to the spread of principles of the rule of law, legality and judicial review of the administrative activities in the western Ukrainian territories.

During the Ukrainian Revolution of 1917 – 1921, the issue of establishing the national system of administrative justice played a significant role in the judicial reform. The Central Rada, Pavlo Skoropadskyi’s Hetmanate and the Directory envisaged the administrative departments functioning within the higher judicial bodies and even the creation of the Supreme Administrative Court. Although most of these plans could not be realised due to military and political circumstances, they demonstrated the desire of Ukrainian statesmen to introduce the European mechanisms for protecting citizens’ rights in their relations with the authorities.

The idea of the administrative courts remained largely a subject of the academic debate during the Soviet period. Despite some projects to establish the administrative courts and draft relevant legislation in the 1920s, the Soviet authorities preferred an administrative procedure for handling complaints. Some scholars supported the need for specialised judicial oversight of administration, whilst the others considered administrative justice incompatible with the Soviet legal system. It was only after Ukraine regained its independence that the issue on establishing administrative courts once again became one of the key areas of judicial and legal reform, which ultimately led to the formation of modern system of administrative justice (Onysko, 2014).

Conclusions. A historiographical analysis on the administrative justice development of in Ukraine reveals a substantial body of academic works devoted both to general issues on the administrative justice and to specific stages in the establishment of the judicial oversight of the public authorities’ activities. The scholars predominantly studied the administrative justice through the prism of the evolution of mechanisms for protecting citizens’ rights and freedoms in their relations with the state, which enables one to trace the gradual transition from administrative forms of control to specialised judicial protection.

In the studies under analysis there were formed similar approaches to the periodisation of the administrative justice development. The majority of authors identify a pre-Soviet stage, linked to the functioning of administrative and judicial institutions in the Russian and Austro-Hungarian empires; the period of the Ukrainian Revolution of 1917 – 1921, when the first attempts were made to establish the national system of administrative justice; the

Soviet period, characterised by the denial or significant restriction of administrative judicial control; and modern stage, which began after the restoration of Ukraine's independence and culminated in the formation of a fully-fledged system of administrative courts.

An important conclusion of the historiography is the recognition that the origins of administrative justice in Ukrainian lands date back to the second half of the 19th century, when, under the influence of the European legal models, the first institutions for resolving disputes between citizens and public authorities began to form. At the same time, the scholars emphasised the limited nature of these institutions in the Russian Empire due to their dependence on the administrative apparatus. There were established more developed mechanisms of administrative justice, which met the European standards of the time in contrast, in the western Ukrainian lands that were part of Austria-Hungary.

The scholars emphasised unanimously that the state-building processes of 1917 – 1921 were of particular significance for administrative justice development. Constitutional acts and legislative proposals of the Ukrainian People's Republic, the Ukrainian State and the West Ukrainian People's Republic provided for the establishment of specialised administrative courts and the introduction of judicial oversight of the public authorities' activities. Although these initiatives were not fully implemented due to the complex political circumstances, they laid the ideological and legal foundations for the future development of administrative justice.

A separate strand of historiographical research is devoted to analysing the transformations of the end of the 20th and the beginning of the 21st centuries. The majority of authors covered the adoption of the 1996 Constitution of Ukraine, the Law of Ukraine "On the Judicial System of Ukraine" and the 2005 Code of Administrative Procedure of Ukraine as key stages in the formation of the modern model of the administrative justice. At the same time, some scholars emphasised that the effectiveness of citizens' rights protection depends not only on the functioning of administrative courts, but also on the improvement of the entire system of public administration and the prevention of human rights violations by the public authorities.

Thus, contemporary historiography formed a fairly comprehensive picture of the main stages in the administrative justice development in Ukraine, however, further study is required into the regional specifics of the administrative justice development, the influence of the European legal traditions on the Ukrainian model of the administrative justice, and the evolution of the academic approaches to its role as an instrument for the protection of citizens' rights and freedoms. Taking everything into consideration, it opens up prospects for further comprehensive historical legal and historiographical research into the above-mentioned issues.

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Pavlo ARTYMYSHYN

PhD (History), Senior Researcher of the Department of the Modern History of Ukraine, Ivan Krypyakevych Institute of Ukrainian Studies, National Academy of Sciences of Ukraine, 4 Kozelnytska Street, Lviv, Ukraine, postal code 79026 (p.artymyshyn@gmail.com)

ORCID: 0000-0002-7501-797X
ResearcherID: AAA-2403-2022
Scopus Author ID: 57836468200

Mykola NADIEIKO

PhD (Economy), Postdoctoral Fellow, Uzhhorod National University, 14 Universytetska Street, Uzhhorod, Ukraine, postal code 88000 (nadieiko.m.m@gmail.com)

ORCID: 0009-0000-1457-0387

Павло АРТИМИШИН

кандидат історичних наук, старший дослідник, старший науковий співробітник відділу нової історії України, Інститут українознавства ім. І. Крип'якевича НАН України, вул. Козельницька, 4, м. Львів, Україна, індекс 79026 (p.artymyshyn@gmail.com)

Микола НАДЄЙКО

кандидат економічних наук, докторант ДВНЗ “Ужгородський національний університет”, вул. Університетська, 14, м. Ужгород, Україна, індекс 88000 (nadieiko.m.m@gmail.com)

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**EXTRAJUDICIAL CONTROL OVER THE ACTIVITIES OF PUBLIC
ADMINISTRATION ENTITIES IN THE FIELD OF ENTREPRENEURIAL
ACTIVITY IN UKRAINE (THE 20th – Early 21st CENTURY):
HISTORIOGRAPHY OF THE ISSUE**

Abstract. *The purpose of the article is to analyze the historiography of extrajudicial control over the activities of public administration entities in the field of entrepreneurial activity in Ukraine during the 20th and early 21st centuries, to identify the main research approaches, the degree of scholarly development of the issue, and the prospects for further studies. The research methodology is based on the principles of historicism, objectivity, and systematicity. Historiographical, problem-chronological, comparative and historical, and systemic methods have been applied. Scientific novelty: for the first time, the development of scientific approaches to the study of the control activities of public authorities in the sphere of entrepreneurship has been traced, the peculiarities of interpretation of extrajudicial*

forms of control different historical periods have been revealed, and a comprehensive analysis of the academic contributions of Ukrainian researchers has been carried out. **Conclusions.** In the study it has been determined that the issue historiography has undergone several stages of development reflecting the transformation of public administration and control mechanisms in Ukraine. It has been found that studies devoted to the period of the Ukrainian Revolution of 1917–1921 focus on the formation of the first national control institutions, whereas research on the Soviet era predominantly characterizes control as an instrument of centralized governance and political supervision. Contemporary historiography examines extrajudicial control within the context of the democratization of public administration, the development of administrative appeal mechanisms, public oversight, the activities of ombudsman institutions, and the implementation of European standards of good governance. At the same time, it has been determined that comprehensive historiographical studies directly addressing the evolution of extrajudicial control in the sphere of entrepreneurial activity remain relatively scarce, which highlights the relevance and scholarly significance of further scholarly research in this field.

Key words: extrajudicial control, public administration, entrepreneurial activity, historiography, business entities, Ukraine, Russo-Ukrainian War.

ПОЗАСУДОВИЙ КОНТРОЛЬ ЗА ДІЯЛЬНІСТЮ СУБ'ЄКТІВ ПУБЛІЧНОГО АДМІНІСТРУВАННЯ У СФЕРІ ПІДПРИЄМНИЦЬКОЇ ДІЯЛЬНОСТІ В УКРАЇНІ (XX – початок XXI ст.): ІСТОРИОГРАФІЯ ПРОБЛЕМИ

Анотація. Мета статті – проаналізувати історіографію позасудового контролю за діяльністю суб'єктів публічного адміністрування у сфері підприємницької діяльності в Україні у XX – на початку XXI ст., визначити основні дослідницькі підходи, ступені наукового опрацювання проблеми та перспективи подальших студій. **Методологія дослідження** ґрунтується на принципах історизму, об'єктивності та системності. Використано історіографічний, проблемно-хронологічний, порівняльно-історичний та системний методи. **Наукова новизна:** уперше простежено розвиток наукових підходів до вивчення контрольної діяльності органів публічної влади у сфері підприємництва, виявлено особливості трактування позасудових форм контролю в різні історичні періоди та здійснено комплексний аналіз наукового доробку українських дослідників. **Висновки.** У результаті дослідження встановлено, що історіографія проблеми пройшла кілька етапів розвитку, які відображають трансформацію державного управління та контрольних механізмів в Україні. З'ясовано, що у працях, присвячених періоду Української революції 1917–1921 рр., увага зосереджується на формуванні перших національних контрольних інституцій, тоді як дослідження радянської доби переважно характеризують контроль як інструмент централізованого управління та політичного нагляду. Сучасна історіографія розглядає позасудовий контроль у контексті демократизації публічного управління, розвитку механізмів адміністративного оскарження, громадського контролю, діяльності омбудсменських інституцій та впровадження європейських стандартів належного врядування. Водночас встановлено, що комплексні історіографічні дослідження, присвячені безпосередньо еволюції позасудового контролю у сфері підприємницької діяльності, залишаються нечисленними, що визначає перспективність подальших наукових розвідок у цьому напрямі.

Ключові слова: позасудовий контроль, публічне адміністрування, підприємницька діяльність, історіографія, суб'єкти господарювання, Україна, російсько-українська війна.

Problem Statement. The relevance of the scientific study of extrajudicial control over the activities of public administration entities in the sphere of entrepreneurial activity in Ukraine in the 20th and early 21st centuries in historiography is determined by the need to summarize and critically evaluate the scientific body of work devoted to the problems of state control, supervision and protection of business entities rights. Against the backdrop of the public administration system transformation, the reform of control and supervisory mechanisms, and the adaptation of national legislation to European standards, it is particularly important to examine how these issues are addressed in the existing historiography, what conceptual

approaches emerged during different historical periods, and which aspects remain under-researched. A historiographical analysis makes it possible to trace the evolution of scholarly views on the nature, forms and legal means of extrajudicial control, to determine the influence of socio-political and legal transformations on the development of relevant research, and to identify changes in the interpretation of the state role in regulating business activity.

Review of Recent Research and Publications. Certain aspects of state supervision, administrative appeals, activities of supervisory bodies, and the reform of public administration system have already been addressed in the historiography in one way or another (Artymyshyn, & Yaromiy, 2025; Bondarenko, 2020; Chubata, 2024; Hai-Nyzhnyk, 2006; Ilnytskyi, & Haliv, 2022). At the same time, there are currently few comprehensive historiographical studies that summarize the development of academic thought on extrajudicial control in the sphere of entrepreneurial activity in Ukraine during the 20th and early 21st centuries. This necessitates, in this publication, the systematization of existing academic work, the identification of key research areas, methodological approaches and issues for discussion, and the outlining of prospects for further research into specific aspects of extrajudicial control in the activities of public administration bodies and the protection of the rights of participants in business relations.

In this context, **the purpose** of the article is to analyze the historiography of extrajudicial control over the activities of public administration entities in the field of entrepreneurial activity in Ukraine during the 20th and early 21st centuries, to identify the main research approaches, the degree of scholarly development of the issue, and the prospects for further studies and early 21st centuries.

Research Results. An important component of the body of historiographical works on the subject under consideration, as well as its theoretical basis, consists of the studies on the phenomenon of legal remedies, which is significant for the entire field of law (including in the area of extrajudicial control over the activities of public administration bodies in the sphere of entrepreneurial activity). For example, according to O. Onufriienko, legal means constitute a set of legal phenomena of a substantive and functional nature, through which participants in legal relations realize and achieve both private and socially significant goals (Onufriienko, 2004, pp. 14–15). O. Hanzenko defined them as a set of legal forms, methods, means and techniques through which parties to legal relationships realize their private or public goals, needs, interests and legitimate aspirations (whether of individuals, society or the state) (Hanzenko, 2016, pp. 36–37). At the same time, A. Denysova interpreted legal means as phenomena manifested through corresponding legal instruments and practical mechanisms for their implementation, by means of which the interests of legal subjects are satisfied and both private and public goals are achieved. The researcher emphasized that legal means serve as key instruments of legal influence, reflect social, instrumental and personal value of law, shape sectoral legal regimes and ensure the functioning of the legal regulation mechanism (Denysova, 2010, pp. 190–191).

V. Averianov made a significant contribution to the development of the theoretical and legal foundations of control within the public administration system. Among other things, he viewed control as one of the basic functions of public administration, ensuring the legality, discipline and effectiveness of the activities of executive bodies. The scholar emphasized that control is a necessary condition for the implementation of administrative decisions, since it is precisely through control that the compliance of the practical activities of public authorities with the set tasks and the requirements of legislation is verified. At the same time,

V. B. Averianov focused on the issues of improving the system of accountability and oversight of executive bodies, viewing them as important guarantees of adherence to the principles of the rule of law and democratic governance (Averianov, 2003, p. 203). At the same time, as early as the 2000s, the scholar, together with a team of colleagues, advocated the need to reform administrative law in Ukraine and to transition from a state-centred to a people-centred model of public administration; they argued for the need to reorient control activities from predominantly punitive functions towards ensuring the rule of law, protecting the rights and legitimate interests of individuals and legal entities, as well as increasing the accountability of public authorities to society. They emphasized the need to establish clear limits on state interference in the sphere of private interests, which is of particular importance for ensuring freedom of entrepreneurial activity and the development of mechanisms for the extrajudicial protection of the rights of business entities (Averianov, 2004, pp. 27–35).

Ultimately, the bulk of the research consists of studies that directly address various aspects of extrajudicial oversight of the activities of public administration bodies in the field of business in Ukraine – both in a historical context and at the present day.

I. Kozachok briefly touched upon the historical experience of the formation and development of state and municipal control, noting only in very general terms that the origins of the system of state control in Ukraine were linked to the Central Rada's establishment of a control department, which was subsequently reorganized first into the Secretariat of State Control, and subsequently – by the Bolsheviks – into the People's Commissariat of State Control. Subsequently, according to the researcher, during the Soviet period, control bodies were tasked with improving the functioning of the state apparatus, countering bureaucracy and mismanagement, overseeing the implementation of decisions by party and state bodies, and ensuring compliance with the law. At the same time, as I. Kozachok argued, in Soviet Ukraine, as in other union republics, a ramified system of comprehensive state control had taken shape. Its functioning was based on a centralized model of governance, under which key decisions were taken by the highest party and state structures. Such a system entailed constant supervision of the activities of enterprises, institutions and organizations and was aimed at ensuring their complete subordination to state bodies and party leadership. Only the emergence of an independent Ukraine in 1991 created the conditions for a significant democratization of this system (Kozachok, 2020, p. 153).

L. Dikan focused in somewhat greater detail on the historical origins of this type of control. The researcher argued that during the period when the Ukrainian lands were part of the Russian Empire, Ukraine did not have its own control bodies, and control functions were carried out by imperial state control institutions subordinate to the Ministry of Finance. Their activities encompassed the audit of financial statements, cash transactions, accounting documents and the general economic condition of individual regions. Even after the revolutionary events of 1917, the main tasks of the control bodies remained unchanged: ensuring legality, the proper use of state funds and oversight of the activities of government bodies and economic institutions.

During the era of the Ukrainian Revolution, control functions took on particular significance. Local branches of the Russian Provisional Government, the Ukrainian Central Rada, Pavlo Skoropadskyi's Hetmanate and the Directory of the Ukrainian People's Republic regarded control as a vital instrument for ensuring the targeted use of financial resources, particularly funds received to maintain the army and the state apparatus. During this period, the first Ukrainian state control body was established – the Control Department, which

was soon reorganized into the Secretariat of State Control. Following the establishment of the Soviet power, its successor became the People's Commissariat of State Control of the Ukrainian Soviet Socialist Republic, formed in January 1919 in Kharkiv.

During the Soviet period, the system of state control underwent numerous reorganizations, yet its core functions remained unchanged. Control bodies conducted audits of budgetary funds, verified the accuracy of accounting and reporting, and monitored the use of material and financial resources. Over the years, these functions were performed by the Workers' and Peasants' Inspectorate, the Financial Control Department, the State Financial Control, the Financial and Budgetary Inspectorate, and the Control and Audit Department. At the same time, the control system gradually became increasingly centralized and evolved into a component of the command-and-control administrative management mechanism, geared towards implementing the decisions of the party and state leadership. In the second half of the 20th century, alongside financial control, bodies of public control developed, designed to involve the public in oversight activities. They monitored the implementation of state plans, the efficient use of resources and the activities of state institutions. However, the control system remained primarily an instrument of centralized management, which led to its excessive bureaucratization and formalization. Towards the end of the USSR's existence, an attempt was made to modernize the system by establishing the USSR Chamber of Control, but its activities ceased with the collapse of the Union.

Following Ukraine's declaration of independence, a new phase in the development of state control began, linked to the transition to a market economy and a democratic model of public administration. In 1993, the State Control and Audit Service was established, and subsequently a network of new control institutions was formed, including the Accounting Chamber, the State Treasury and other specialized bodies. The development of the modern control system took place in two main stages: formation (1990 – 1997) and subsequent improvement and reform (since 1998). Current reforms are aimed at enhancing the effectiveness of control, bringing it into line with European standards, ensuring financial discipline and improving oversight mechanisms in a market economy and democratic governance (Dikan, 2006, 21–27).

V. Bortniak also put forward similar arguments. In discussing the development of the system of state control over business in Ukraine, he identified several key milestones that reflect the transformation of public administration and economic relations. As he argued, the first state control body in Ukraine was established by the Central Rada, initially in the form of a control department, which was subsequently reorganized into the Secretariat of State Control (of the Ukrainian State under P. Skoropadskyi), and later into the Bolshevik People's Commissariat of State Control (NKDC) of the Ukrainian SSR. (Its composition initially included the Supreme Socialist Inspectorate, founded in January 1919, which in early May 1919 separated from the NKDC to form the independent People's Commissariat of Soviet Socialist Inspection (NK RSI)). Its remit included oversight of the financial, administrative, military, industrial, agricultural and transport sectors. The main tools of its work were preliminary, ongoing and subsequent audits, the verification of financial statements, estimates and economic plans, as well as the detection of abuses and violations in the workings of the state apparatus.

In 1920, following the reorganization of state control bodies, the All-Ukrainian Workers' and Peasants' Inspection (RSI) was established, becoming the sole body of socialist state control. Its activities were aimed at scrutinizing the work of Soviet institutions, combating bureaucracy and ensuring the implementation of state decisions. However, excessive

centralization and the desire to extend control to all spheres of state administration led to an overload of the inspection apparatus and reduced the effectiveness of its oversight work. Consequently, in the early 1920s, the structure of the RSI was simplified, and its activities became more systematized (Bortniak, 2020, pp. 33–34).

Furthermore, according to V. Bortniak, the period of the New Economic Policy and subsequent industrialization led to the emergence of new supervisory institutions. In particular, in 1924, the Institute of State Accounting Experts was established, designed to ensure proper accounting and reporting at state, cooperative and private enterprises. At the same time, the system of financial control developed: within the structure of the People's Commissariat of Finance, there were financial control bodies, which were later transformed into the Financial and Budgetary Inspectorate and the Control and Audit Departments. The latter were granted broad powers to conduct documentary audits of the activities of enterprises, institutions and organizations.

Ultimately, as the scholar summarized, during the Soviet period the control system gradually evolved into a comprehensive mechanism of state supervision, aimed not only at ensuring legality and financial discipline, but also at implementing the political objectives of the party and state leadership. The main areas of activity for the control bodies were the improvement of the state apparatus, the fight against bureaucracy and mismanagement, as well as monitoring the implementation of party and government decisions. This model was based on strict centralization of management and the state's desire to control virtually all aspects of the activities of enterprises and organizations.

Following Ukraine's declaration of independence, the system of state control underwent significant changes. The abandonment of the command-and-control model, the development of a market economy, private property and entrepreneurship led to a reduction in direct state intervention in economic activity. At the same time, new control institutions were established, in particular the Accounting Chamber, the State Treasury of Ukraine and other specialized bodies. The development of the state financial control system went through stages of formation, institutional development and harmonization with European standards. In these circumstances, control gradually transformed from an instrument of administrative coercion into a mechanism for ensuring the legality, transparency and efficiency of economic relations, supplemented by financial, audit, public and other forms of control (Bortniak, 2020, pp. 34–36).

The lion's share of research on extrajudicial control over the activities of public administration entities in the sphere of entrepreneurial activity consists of studies on the legal aspects and processes of these phenomena at the present stage in Ukraine. T. Halachenko, in examining the concept and essence of control over entrepreneurial activity, asserts that it is an integral element of the social management system, since without an assessment of the actual implementation of established norms and requirements, management activity loses its effectiveness and is reduced to purely declarative provisions. At the same time, in the researcher's view, state control acts as a specific verification mechanism operating within the system of state coercion. Accordingly, the entity subject to control is obliged to comply with the lawful requirements of the controlling body, in particular to provide the necessary information or ensure access to it. Such requirements are based on legally defined powers to conduct inspections, supervision or monitoring, which constitute the substance of control activities (Halachenko, 2023, pp. 699–702).

At the same time, in another study defining the concept of a public supervisory body in the field of business activity, T. Halachenko noted that this refers to a public authority or other institution defined by law, as well as their officials, who are vested with the relevant

competence and procedural powers to initiate, conduct and record the results of control measures, as well as to adopt response measures with the aim of establishing the compliance of the controlled entity's activities with the requirements of the law. The lawfulness of such an entity's activities is ensured by the existence of a proper legal basis, the exercise of powers within the defined scope of competence, compliance with established procedures, proper justification of decisions taken, a sufficient evidential basis, and the guarantee of the possibility of effective administrative and judicial appeal (Halachenko, 2024, p. 830).

In describing the administrative and legal status of entities responsible for ensuring the realization of citizens' rights in the sphere of entrepreneurial activity,

O. Leonov argued that it encompasses the totality of the objectives of their activities, the tasks and functions assigned to them, the powers and competences granted by law, as well as the established accountability for the results of their implementation. Its specific nature is determined primarily by the tasks that the legislator assigns to a specific entity within the mechanism for ensuring the realization of the right to engage in entrepreneurial activity. Given the functional purpose of such entities, the researcher identified several groups among them. He classified entities that carry out regulatory and legal control of entrepreneurial activity by establishing generally binding rules of conduct in the relevant sphere – in particular, the Verkhovna Rada of Ukraine, the President of Ukraine, and the Cabinet of Ministers of Ukraine – into the first group. The second group, in his view, consists of bodies authorized to verify individuals' compliance with statutory requirements for conducting business activities and to carry out their state registration. , the third group, as the researcher stated, includes bodies that make decisions on granting special permits, approvals or licences required for carrying out certain types of economic activity, including those related to the use of natural resources. He classified the fourth group as comprising institutions whose primary purpose is to promote the development and support of entrepreneurship. Finally, in his view, the fifth group comprises entities that perform control and supervisory functions regarding compliance with legislation in the economic sphere, ensuring fair competition and preventing breaches of established requirements for the conduct of business activities (Leonov, 2023, p. 111).

M. Nadieiko notes that extrajudicial oversight of the activities of public administration bodies in the field of entrepreneurship is an important component of the mechanism for ensuring the legality, transparency and accountability of public authorities, which contributes to the effective protection of the rights and legitimate interests of business entities without placing an excessive burden on the judicial system. In the author's view, the role of this phenomenon is particularly heightened in the context of a more complex regulatory environment, the digitalization of administrative processes and European integration, which necessitates the introduction of modern, flexible and preventive forms of control.

Extrajudicial control is comprehensive and multi-level in nature and is implemented through a system of interrelated institutional and procedural mechanisms. Its main forms include administrative appeals, state supervision (control), parliamentary control, the activities of ombudsmen, including the business ombudsman, public control, as well as e-governance tools and alternative dispute resolution methods. Taken together, these elements form a coherent system of influence over the activities of public administration bodies (Nadieiko, 2024, p. 907).

Furthermore, the study proposes a classification of legal instruments for extrajudicial oversight. Based on their functional purpose, these are categorized as preventive (information requests, consultations, public discussions, online services), corrective (orders,

demands, decisions of supervisory bodies, measures in response to violations), restorative (administrative appeals, ombudsman's recommendations, mediation) and punitive (fines, administrative and economic sanctions). Based on the subject criterion, a distinction is made between internal administrative measures (internal control, internal audit, disciplinary procedures) and external measures (parliamentary, public and independent institutional control). In terms of form of implementation, he distinguished between normative measures (legal norms, principles, regulatory acts) and procedural measures (acts of law enforcement, complaints, inspections, requests, electronic tools). Finally, according to the scholar, the effectiveness of non-judicial control is determined not only by the existence of relevant legal mechanisms, but also by the level of their practical application, the independence of supervisory bodies, the clarity of procedural safeguards, as well as the degree of digitalization and transparency of public administration, with the transformation of oversight activities from a predominantly punitive model to a preventive one – aimed at preventing violations and developing partnership relations between the state and business –being particularly important (Nadieiko, 2024, p. 907).

V. Iniakhin, in describing the interaction between public administration bodies and business entities as a key instrument through which state policy in the sphere of economic activity is implemented, and through which the fundamental principles of stimulating entrepreneurship as the basis for economic development and, consequently, the economic stability of the state, find their expression, whilst clarifying that such interaction, on the one hand, is multifaceted and is therefore implemented at several levels (depending on the scale and specifics of social relations, the author distinguishes the national, regional, sectoral and local levels of such interaction, each of which is characterized by its own tasks, composition of participants and implementation mechanisms), whilst on the other hand, it is not of an unlimited nature but is carried out within the limits defined by current legislation and the practical needs of administrative activity, and is determined by a number of factors, among which the following are decisive: the scope of powers and competences of public administration bodies; the range of business entities operating in the relevant sector; the list of issues constituting the subject of their interaction; the strategic goals and priorities enshrined in policy-making regulatory acts that define the main directions of public authorities' activities; and the need to ensure a balance between the public interests of society and the legitimate interests of business entities (Iniakhin, 2023, pp. 7–10).

In her doctoral thesis, V. Voiutka comprehensively analyzed the administrative and legal framework for control and supervisory activities in the business sector and proposed her own interpretation of its essence, content and characteristics. Thus, she defined control and supervisory activities as a legally regulated mechanism for ensuring legality and the rule of law in the economic sphere, implemented through a system of forms, methods and means of control and supervision. V. Voiutka argued that such activities constitute a specific type of law enforcement activity carried out by public administration bodies, are procedural in nature, are conducted exclusively within the framework of procedures defined by law, and are aimed at achieving a balance between the protection of public interests and the safeguarding of freedom of entrepreneurial activity. She focused on the characterization of entrepreneurial activity as an object of control and supervision. The researcher noted that its specific nature is determined by the freedom of enterprise, the economic and social significance of economic activity results, as well as its impact on the implementation of state economic policy. According to the scholar, control and supervision activities encompass both procedures for registering and terminating

business activities and the verification of compliance by business entities with the requirements established by law, including licensing, permitting and other obligations. The author has also systematized the legal foundations for the exercise of control and supervision, which cover the constitutional, legislative and subordinate levels of legal regulation.

A key finding of the study was the identification of administrative and legal forms and methods of control and supervision in the business sector. The author highlights forms such as licensing, certification, accreditation, inspections, audits and monitoring, and proposes a classification of control and supervisory methods into general and specialized categories. The need to improve administrative legislation in this area is justified by increasing the effectiveness of control procedures, expanding the use of modern analytical and digital tools, and ensuring adequate safeguards for the rights of business entities during the implementation of control measures (Voiutska, 2024).

In examining Ukraine's experience of extrajudicial control in the field of business activity, a researcher V. Vasyliiev considered it in the context of legal mechanisms for combating offences in the relevant sphere. In the study, the author argues that the effective development of entrepreneurship in Ukraine depends on the state creating appropriate legal, organizational, economic and socio-political conditions that ensure the effective exercise of the constitutional right to engage in business activities. The researcher also devotes considerable attention to the analysis of administrative offences in the field of entrepreneurship, among which are classified (depending on the nature of the infringement) offences against entrepreneurial activity, the principles of fair competition and consumer rights. A key focus of his work is the study of the administrative-legal mechanism for countering offences in the field of entrepreneurship, which V. Vasyliiev defines as a system of preventive and enforcement measures implemented by authorised bodies with the aim of ensuring compliance with legislation and preventing offences (Vasyliiev, 2019, pp. 27–29).

The author paid particular attention to state and public oversight as key elements in ensuring the rule of law in the sphere of business activity. V. Vasyliiev emphasized the leading role of state oversight in the mechanism of legal regulation of economic relations, and also highlighted the importance of public oversight and the activities of public councils as institutional forms of civil society participation in combating offences. Finally, in the paper, the author examined issues of licensing, administrative procedures and administrative liability of business entities, and justified the need for deregulation of economic activity, the elimination of duplication of control functions by government bodies, the improvement of the system of administrative sanctions, and the introduction of a risk-based approach to the exercise of state supervision and control (Vasyliiev, 2019, pp. 29–33).

At the same time, the researchers L. Khomko and H. Kulhavets defined state control over the activities of business entities as a system of inspections and monitoring of business entities' activities, aimed at identifying violations of legislation, preventing negative phenomena and stopping unlawful activities (Khomko, & Kulhavets, 2016, p. 302).

L. Soroka views the phenomenon of state control in this context more broadly – as a complex of organizational, legal, informational and inspection measures carried out by authorized state bodies with the aim of ensuring the legality of economic activity, protecting consumer rights, guaranteeing the proper quality of goods and services, and safeguarding public interests (Soroka, 2020, p. 174).

At the same time, although researchers generally acknowledge that the current legislation on state supervision (control) in the sphere of economic activity – which sets out the principles

for organizing supervisory activities, the scope of authorized bodies, and the procedures for carrying out supervisory measures – prior to 2022 formed a system that generally ensured the performance of the functions assigned to it (even though a significant number of special and subordinate regulatory acts in this sphere often led and continues to lead to fragmentation of legal regulation, duplication of powers among supervisory bodies, and ambiguity in law enforcement practice) (Yarema, 2021), in the context of the introduction of martial law in Ukraine, the issue of state control in the business sector, in the opinion of scholars, is becoming increasingly relevant. Reform in this area is needed, taking into account new socio-economic and security conditions, whilst simultaneously strengthening the legal regulation of the supervisory activities of executive authorities, clarifying their powers and improving mechanisms for interaction between the state and business entities, whilst at the same time adopting a gradual approach from a supervisory function towards ensuring the proper protection of the rights, freedoms and legitimate interests of individuals and business entities (Punda, 2023).

For example, K. Bortniak, O. Merdova, V. Tsomra and other researchers emphasize that, in the current context of the Russo-Ukrainian war, the administrative and legal regulation of state control in the sphere of business activity has taken on new characteristics in the context of revising existing administrative and legal norms and improving mechanisms for interaction between regulatory bodies and business entities. Among the key areas of such changes, the researchers highlight the need to clearly define the objectives of state control, establish transparent rules for interaction between executive authorities and business entities, and specify the rights and obligations of officials exercising control powers; ensuring the principles of integrity and compliance in the activities of supervisory bodies as an important condition for improving the effectiveness of state oversight. At the same time, the researchers emphasize the need to take into account the specificities of how individual regions operate under martial law and to adapt control mechanisms to new security challenges. In this regard, the report justifies the need to strengthen state control at regional and local levels, as well as to expand opportunities for public oversight, which requires further regulatory and legal framework development and improvement of relevant legal mechanisms (Bortniak, Merdova, Tsomra, Daraganova, & Mykhailov, 2023, p. 289).

Ultimately, M. Blikhar concluded that, despite certain advances made in Ukraine in the field of administrative and legal regulation of state control over business entities in the post-Soviet era, a number of significant problems still exist which negatively impact the effectiveness of control mechanisms and hinder further reform of the public administration system. The author identified the most significant of these as the insufficient regulation of certain aspects of control activities at the legislative level, the fragmentary and contradictory nature of the regulatory framework, and the lack of a clear and systematic classification of types of state control in the field of business. In the researcher's view, the situation has been further exacerbated by military hostilities, the temporary occupation by the Russian Federation of certain territories of Ukraine, the destruction of economic infrastructure, and restrictions on the ability to conduct economic activity in the regions affected by the armed aggression (Blikhar, 2024, p. 20).

Conclusions. From a historiographical perspective, the studies of extra-judicial oversight of public administration bodies in the field of business in Ukraine during the 20th and early 21st centuries demonstrate a close link between the evolution of oversight institutions and the processes of state-building, the transformation of political regimes. The authors

emphasize that prior to 1917, the Ukrainian lands did not have their own system of state control, as control functions were exercised by the pan-imperial bodies of the Russian Empire. At the same time, in the studies on the period of the Ukrainian Revolution of 1917 – 1921, a chief focus is on the attempts to establish national control institutions, notably the State Control and the Secretariat of State Control, which became important elements in the formation of the financial and administrative apparatus of the Ukrainian statehood. In the studies concerning the Soviet period, the prevailing conclusion is that control bodies gradually transformed from a means of financial and administrative oversight into an instrument of centralized management and political control. The historians note that the reorganization of the People's Commissariat of State Control, the Workers' and Peasants' Inspection, the financial control departments, and the control and audit bodies was primarily driven by the needs of the command-administrative system. The academic literature emphasizes that the main functions of these structures became monitoring the implementation of state plans, combating bureaucracy, and ensuring the implementation of decisions by the party and state leadership, which contributed to the formation of a system of comprehensive state supervision.

Contemporary Ukrainian historiography generally views the Soviet model of control critically, emphasizing its excessive centralization, politicization and the formal nature of many control procedures. The researchers emphasize that following Ukraine's declaration of independence, there arose a need to establish a new control system based on the principles of democratic governance, transparency and public accountability. In this regard, a chief focus is on the creation of new state financial control institutions, the improvement of the legislative framework and the gradual alignment of the national control system with European standards.

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Vitalii YAREMCHUK

PhD hab. (History), Professor at the Department of History, National University of Ostroh Academy, 2 Seminarska Street, Ostroh, Rivne Oblast, Ukraine, postal code 35800 (vitaliiaremchuk@gmail.com)

ORCID: 0000-0003-2493-7271

ResearcherID: C-1039-2019

Віталій ЯРЕМЧУК

доктор історичних наук, професор кафедри історії, Національний університет “Острозька академія”, вул. Семінарська, 2, м. Острог, Рівненська обл., Україна, індекс 35800 (vitaliiaremchuk@gmail.com)

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**HISTORY POLICY OF THE POLISH RIGHT-WING FORCES (2015 – 2023)
IN SCHOLARLY INTERPRETATIONS**

Abstract. *The purpose of this article is to identify the main approaches that have emerged in the professional literature regarding interpretations of the history policy pursued by Poland’s ruling “Law and Justice” Party (and supported by its political partners and ideological sympathisers in civil society) in 2015 – 2023. The research methodology is based on the methods of intellectual history, historiographical analysis, and historiographical synthesis. Scientific Novelty.* *For the first time, an array of scientific literature devoted to understanding the history policies of the Polish right-wing forces during their dominance in the Polish political life has been analysed. This provides a basis for a comprehensive understanding of this phenomenon as a factor in the country’s socio-political life and its international relations. Conclusions.* *A distinctive feature of professional research into the history policy of the Polish Right is the interdisciplinary nature of the studies, which provokes interest in its various aspects and manifestations. In the social sciences and humanities, its essence has generally been interpreted as a typical right-wing and conservative discourse, grounded in sentiments widespread among the Polish intellectual and cultural elite and in the Polish society at large – namely, a nostalgia for a “true Poland” allegedly lost as a result of communist and post-communist history amnesia. Professional literature convincingly argues that right-wing politicians and their supporters in various social groups actively promoted the “Polish view” of history for reasons of both social appeal and political expediency. The desire to establish the Right agenda led to the intensification of official history policy and a transfer of its main efforts to the most ‘pain’ points of Poland’s past, which was relatively successful in terms of political instrumentalisation. It has been also identified that there was a lack of serious opposition to the “right-wing” turn among the traditionally influential circle of intellectuals who advocate the establishment of a European model and practices of historical memory in Poland. Overall, the contemporary social sciences and humanities have produced analytical works on the most significant issues of the right-wing government’s history policy during its time in power in Poland from 2015 to 2023. In view of this, it is timely to conduct synthetic studies on the issue.*

Key words: *history policy, Poland, “Law and Justice” Party, scientific reception, historical memory.*

ІСТОРИЧНА ПОЛІТИКА ПОЛЬСЬКОЇ ПРАВИЦІ (2015 – 2023) В НАУКОВИХ ІНТЕРПРЕТАЦІЯХ

Анотація. Мета статті – встановити головні підходи, які склалися в спеціальній літературі стосовно інтерпретації історичної політики, що провадилася правлячою у Польщі партією “Право і Справедливість” (її підтримувалася її політичними партнерами й ідеологічними симпатиками в громадянському суспільстві) впродовж 2015 – 2023 рр. **Методологія дослідження** базується на методах інтелектуальної історії, історіографічного аналізу, історіографічного синтезу. **Наукова новизна.** Вперше проаналізовано масив наукової літератури, присвяченої осмисленню історичної політики польських правих сил впродовж їх домінування в політичному житті Польщі. Це дає підстави для цілісного розуміння цього феномену як фактора суспільно-політичного життя країни і її міжнародних взаємин. **Висновки.** Показовою рисою професійного вивчення історичної політики польської правіці є міждисциплінарний характер студій, що зумовлює інтерес до різноманітних її аспектів та виявів. Загалом в соціогуманітаристиці розкрито її сутність як типового правого і консервативного дискурсу, який спирається на поширені в польській інтелектуальній і культурній еліті, в польському суспільстві настрої ностальгії за “справжньою Польщею”, яка нібито втрачена в ході комуністичної та посткомуністичної історичної амнезії. В спеціальній літературі переконливо обґрунтовано, що політики правого спектру та їхні симпатиками в різних соціальних групах активно просували “польський погляд” на історію з мотивів його як соціальної привабливості, так і політичної рентабельності. Прагнення утвердити праву адженду зумовило інтенсифікацію офіційної історичної політики і перенесення її головних зусиль на найбільш “больові” точки польської минувшини, які надаються до їхньої порівняно успішної політичної інструменталізації. З’ясовано також феномен відсутності серйозної протидії “правому” розвороту серед традиційно впливового кола інтелектуалів, які виступають за утвердження в Польщі європейської моделі і практик історичної пам’яті. Загалом, сучасна соціогуманітаристика диспонує аналітичними працями з найбільш важливих питань історичної політики правого табору впродовж його перебування біля керма влади у Польщі у 2015 – 2023 рр. З огляду на це цілком на часі й підготовка синтетичних студій проблеми.

Ключові слова: історична політика, Польща, партія “Право і Справедливість”, наукова рецепція, історична пам’ять.

Problem Statement. The history policy (hereinafter referred to as the HP) pursued in Poland during the rule of the right-wing conservative “Law and Justice” Party (“Prawo i Sprawiedliwość”, hereinafter referred to as LJP) (2015 – 2023) was a significant factor in the country’s socio-political life and international relations. It should be noted that despite the LJP losing its absolute majority in December 2023, following parliamentary elections in the country, the HP in Poland remains unchanged in its key features as of the end of 2025. The radical historical revisionism suggested by the creators of the “new history policy” stirred up intellectual circles and caused tension in inter-state relations. It is essential to recognise that the active promotion of the ‘Polish view’ of the past by government forces has been and continues to be based not only on state resources, but also on the support of a significant portion of the Polish population. This conservative wave in the spiritual and socio-political life of a modern European state, which came as a surprise to many, is a phenomenon that naturally attracted the interest of the scientific community. After all, we are talking about a country that seems to have chosen a distinctly European model of historical memory and the HP, until recently characterised by a balanced representation of diverse views on its cultural and historical heritage, fairly widespread sentiments of “critical patriotism”, including the reception of Poles’ responsibility for the unattractive pages of their national history.

Review of Recent Research and Publications. Currently, we are not aware of any research papers that address the issue of the HP in Poland from the perspective outlined in the title of this article. At the same time, certain aspects and specific manifestations of it are analysed in detail in several special publications, the content of which will be revealed in the central part of the article.

In particular, we now have a high level of understanding of the concept of HP itself. It has been introduced into the circle of legitimate concepts in the social sciences and humanities, instead of the relatively widespread reception of it as a “distortion of science” or a kind of “degenerative historiography” (Chwedoruk, 2018, p. 179). In this regard, much has been done by the Polish scholars, who in recent years have prepared a series of studies based on the European and global context of “memory studies”, as well as on the vast experience of addressing the past in public and intellectual spheres that has been accumulated in Poland over the last two centuries (Kalicka, Witek, 2014; Kačka, Piechowiak-Lamparska, Ratke-Majewska, 2015; Chwedoruk, 2018; Ruchniewicz, 2018; Witek, Mazur, 2022; Lubecka, Zakrzewski, 2022).

Special studies on the content of the HP of the Polish right-wing forces in 2015–2023 discuss its ideological foundations (Harper, 2020; Szeligowska, 2016; Kassner, 2023; Tryma, Stadnichenko, & Salnikova, 2023; Głowacka, 2024) and the image of history it advocates (Harper, 2020; Stobiecki, 2022; Stobiecki, 2023). The roles of its actors (subjects) (Łuczewski, 2017; Wojdon, 2018; Behr, 2021; Wojdon, 2022; Łuczewski, 2022; Górny, 2024) and the reception of HP by the Polish society (Stryiek, Skłokin, 2022; Jaskułowski, Majewski, 2024) are analysed. There is a critical discussion of its individual areas. The most convincing concept to date is that of “cursed soldiers” (*Żołnierze Wyklęci*), which has become a key public symbol of the right-wing politics in Poland during the LJP’s rule (Kończal, 2020; Jaskułowski, Majewski, 2024). In their book, K. Jaskułowski and P. Majewski use the example of the “cursed soldiers” to provide the first comprehensive analysis of the role played by civic activists not affiliated with the Polish right-wing forces or cultural institutions in shaping the right-wing history policy (Jaskułowski, Majewski, 2024, pp. 74–81). The first in-depth studies on the policy of radical reinterpretation of the Polish-Jewish relations during the Holocaust, launched in 2015, have been published (Hackmann, 2018; Kończal, 2022). Important are attempts of the academic statements about a drastic change in the Polish politics and society in relation to the “Volhyn issue”, the shift under the leadership of the LJP of dramatic events in the Ukrainian-Polish relations during World War II into the focus of the Polish historical memory (Kalishchuk, 2020; Morozova, 2020; Khakhula, 2021).

Thus, to date, a wealth of important research has been accumulated on individual aspects of the history policy of the Polish HP during the eight years of LJP rule. It deserves careful study and consideration of its key conclusions.

The purpose of this article is to determine the main approaches that have emerged in the professional literature regarding interpretations of HP carried out by LJP (and supported by its political partners and ideological sympathisers in the Polish civil society) from 2015 to 2023. In other words, we aim at analysing the scholarly reception of the “new historical policy”. We do not set out to present the facts and events about the implementation of this policy per se, as they are sufficiently well known to the interested reader. (At the same time, it is clear that in order to explain HP in a specific country and at a specific time, we cannot dispense with at least a brief outline of its empirical dimension). The authors of the texts under study are primarily representatives of the social sciences and humanities, particularly

history, sociology, and political science. The interest in this issue among scholars from various fields of the humanities and social sciences can be explained by the fact that the HP itself is not purely a “history” phenomenon, but is of a distinctly interdisciplinary nature. It is likely that in this case we are also talking about the political resonance of the LJP’s policy, in particular its humanitarian component, which, as is often the case, causes scholars to focus more on the issue that is not only purely “academic” but also “topical”. Let us focus on the texts whose authors demonstrate a desire for deep reflection on the Polish HP, rather than an immediate (and therefore, it seems, emotionally charged and having unjustified generalisations) response to its manifestations. Naturally, this perspective does not involve analysing the texts of HP actors themselves, delving into their statements and discussions. However, it focuses on an “outside” view, an unbiased perspective, one that resonates from a more sophisticated environment. Of course, the author of this article understands well the relativity of the concept of “objective science” when it comes to the field of social sciences and humanities, but remains a supporter of its significant expert role. Its expert functions are indisputable for us, as they are based on conventional methodology recognised by the scientific community. Secondly, the author is aware that scholars are also actors in the HP – therefore, the idea that they exist “outside” of it is, by and large, also an illusion. However, it is scholars who usually (in this specific instance, particularly) strive more than anyone else to distance themselves from the object of their research. In our opinion, this approach lays the groundwork for a holistic, comprehensive, and complete understanding of the phenomenon under consideration. At present, given the insufficient development of Poland’s “new history policy” in its entirety and its “hot” and ongoing nature, the implementation of this goal remains an assignment for the future.

Research Results. In the modern view, the HP can be defined in various ways, and the debate about its essence continues (Wojdon, 2018, p. 81; Chwedoruk, 2018, pp. 186–189). However, most researchers agree on its defining characteristics as a scientific category. Given the current state of understanding of the HP, its most general definition could be as follows: it is a conscious activity of its actors (subjects) aimed at the historical consciousness of society/historical memory (its object) through reference to the past for a specific purpose. Today, consensus omnium also means acknowledging the pluralism of the HP actors. When it comes to attempts to systematise (or classify) them, the Polish publications, for example, favour the approach of R. Traba, who believes that at least four actors are involved in the creation of HP: government forces, local authorities, mass media and civil society (Traba, 2009, p. 61). There is also a clear consensus among researchers regarding the most common goals of the HP. These include the establishment, preservation and expansion of political power, the formation of identity, compensation for victims of crimes (return of illegally seized property, reparations, political rehabilitation, restoration of good name), and the protection of a country’s interests in the international arena (Wójcik, 2016; Lubecka, & Zakrzewski, 2022, p. 44). When considering HP as a phenomenon and its ‘Polish’ segment, it is also essential to have a well-established scientific understanding of the reasons for its fundamental differences, which are characteristic of individual countries. They are primarily due to differences in political regimes: “In democratic countries, the authorities try to take into account a certain pluralism of views on the past. In totalitarian systems, the situation is simpler, as the ruling entity seeks to control all areas of public life and, de facto, obtains a monopoly on shaping the historical narrative. Somewhat more complex is the practice of authoritarian states, which may attempt to implement both monopolistic practices and

define only the limits of possible discourse, allowing for limited pluralism” (Lubecka, & Zakrzewski, 2022, p. 37). It is also worth noting a peculiar terminological chaos: in addition to the term “history politics”, specialised literature uses its close or absolute substitutes, the most common of which is “memory policy”. However, we will use the term “history policy” because it is more widely used in Polish academia and its public discourse.

The HP’s presence in Poland from 2015 to 2023 was marked by several key manifestations that are recognised as such by both its supporters and neutral observers and critics. In particular, it has become one of the important phenomena in the country’s socio-political and cultural life, in contrast to the previous situation, which was characterised by relatively limited interest, with discussions rarely extending beyond the intellectual sphere. The role of the state and its affiliated cultural institutions has grown significantly, whereas previously it was predominantly the domain of social actors. The leading specific topics covered by the HP from 2015 to 2023 included the activities of the Polish anti-communist underground in the post-war years (“cursed soldiers”), the participation of the Polish people in the rescue of the Jews during the Nazi Holocaust, and the “unjustified” and “mass” killings of peaceful civilians of Polish ethnicity by soldiers of the Ukrainian Insurgent Army in 1943 – 1944 in the eastern territories of the interwar Polish state (Kresy Wschodnie), interpreted as genocide (Ludobójstwo) of the Poles by “Ukrainian nationalists”.

When discussing the academic reception of the “new history policy”, it is worth noting that the academic discourse is dominated by a critical or negative attitude towards the HP of the Polish right wing in general, including during their eight-year rule, which is the subject of this article. The common ground was the acknowledgement of its worldview anachronism. This refers to its aggressive defence of the ethno-national narrative in its extreme forms of the Polish exclusivity and megalomania, as its primary focus is on manifestations of the Polish heroism and Polish martyrdom. The Polish history in it has acquired apologetic and hagiographic content, while its shameful pages have been marginalised. Authoritarian methods employed in its implementation and attempts to monopolise the realm of historical memory are condemned. In contrast, memory, in the words of Polish historian P. Witek, “is one of the forms of freedom” (Witek, 2011, p. 94). Its destructive social consequences are noteworthy (inciting hostility, deepening the polarisation of Polish society instead of uniting it within the framework of a political nation¹). The HP of LJP is accused of provoking tensions in Poland’s relations with some of its allies and partners (in particular, Israel, the United States, and Ukraine) and damaging the country’s international reputation.

According to R. Stobiecki, the version of Polish history that prevails in the minds of the creators of the “new history policy” resembles a kind of historical utopia, because it offers an “ideal” vision of the Polish nation’s past. By this vision, the scholar means, first, an image of the national past that gives Poles a sense of pride; second, one that heals various complexes derived from history; and third, reinterprets the history of Poland in the history of Europe not as a peripheral, backward state or nation, but as one that has been an integral part of Western civilisation for centuries (Stobiecki, 2022, p. 34; Stobiecki, 2023, p. 160). This largely fictionalised past perfectly suits the needs of right-wing forces, as it depicts the Poles as always heroic and noble, never doing evil, defending national dignity and “true” (rather than “false”) European values. The modern ideological platform of the LJP (whose basic

¹ According to T. Stryiek and V. Sklokin, the political and ideological division of Polish society (unlike Ukrainian society) is currently deepening, which gives grounds for implementing the metaphor of “two Polands” – similar to M. Riabchuk’s well-known thesis about “two Ukraines” (Stryiek & Sklokin, 2022, p. 44).

ideas are Polish-centrism and moderate Euroscepticism) is transferred to the past (which in the “new history policy” appears to be equally Polish-centric and sceptical of the West, which ostensibly constantly “betrayed” Poland – “an innocent victim of the powerful of this world”) and is used to legitimise it as the only correct one for Poland (Stobiecki, 2022; Stobiecki, 2023; Jaskułowski, & Majewski, 2024).

If we try to identify the most controversial aspects of the historical past, the reflection of which in the HP of the right-wing forces since 2015 has been sharply criticised by scholars, then, in our opinion, this is a large-scale campaign to glorify the “cursed soldiers”, which has become a “new fashion” or even a “cult”, and an unprecedented official rewriting of the history of Polish complicity in the Holocaust in order to downplay it and exaggerate the role of the Poles in saving the Jews. It is easy to notice that these two trends clearly demonstrate the two main mechanisms of the HP implementation – an emphasis on “remembering” (“cursed soldiers”) and an emphasis on “forgetting” (Polish-Jewish relations). At the same time, it is equally telling that the two most popular themes of the “new history policy” demonstrate two basic methods of manipulating the past that are characteristic of any HP, as analysed by the Polish historian J. Tokarska-Bakir: *suggestio falsi* (suggestion of falsehood) and *suppressio veri* (suppression of the truth) (Wojdon, 2018, p. 83). K. Kończal, K. Jaskułowski, and P. Majewski have convincingly substantiated the classification of the construction of the concept of the “cursed soldiers” as an instance of the “invention of tradition”, first comprehensively described in the seminal 1983 volume edited by Eric Hobsbawm and Terence Ranger (Kończal, 2020; Majewski, 2024).

The general premise of the HP, which has been implemented since 2015, is considered to be the crisis of the project of a democratic European Poland, which is defended by liberal and left-wing forces on the country’s political spectrum, and, conversely, the rise in authority and political influence of right-wing, traditionalist, and populist forces (after all, this trend is now almost universal). These shifts in the Poles’ political preferences were triggered by the Smolensk catastrophe of 2010. The processes referred to as the “illiberal revolution” (Harper, 2020) were also clearly evident in the field of HP.

According to observers, the double victory in 2015 was not simply a victory of the “conservatives” over the “liberals”, but rather a clash between two patriotic forces and two concepts of patriotism, which differ primarily in their attitude toward the past. Thus, 2015 saw the defeat of supporters of “critical patriotism” and the victory of those supporting “forward-looking patriotism”. It should be emphasised that the debate about what kind of patriotism the Poles need played an important role in the Polish political discourse during the first 25 years of the modern Polish state’s existence. Critical patriots believe that the state HP should promote a sober, responsible, and balanced understanding of the past as a prerequisite for building a pluralistic and tolerant state. In their opinion, the discussion should not only focus on heroic moments, but also on exposing the uncomfortable truths about Polish history. Thus, the Poles should pave the way toward the European model of historical memory. “Critical patriotism” gained particular prominence during the debate on the Polish collaboration in the Holocaust (‘the Jedwabne debate’) (Szeligowska, 2016; Korycki, 2019; Kończal, 2024). In fact, this approach assigns the past a subordinate role in the pursuit of the future, because it is not so much about Polish history as it is about Poland acquiring an authentic Western civilisational identity.

In contrast, “traditionalists” oppose this forward-looking paradigm with their own – “the selection of the past” (Łuczewski, 2022, p. 737). They have criticised the Polish elite and

left-liberal politicians for neglecting national education. It gives an important role to the ‘true history’ of Poles and Poland, which is believed to have been suppressed and half-forgotten during the reign of these forces in the country throughout almost the entire post-communist period (and in this, according to representatives of the right wing, in fact, followed the example of the communist leadership of the Polish People’s Republic, a loyal satellite of imperial Moscow). It refers to the “revival of the Polish view” of history and to the HP, which aims to give independent significance to historical heritage as an important argument in enhancing national dignity, in extreme forms, the greatness and uniqueness of Poland and the Poles. Naturally, such HP leads to the construction of a “monumental” (to use F. Nietzsche’s well-known classification) version of history, and tends to silence crimes and transgressions. This view of the role of the past is linked to the political ideology of the right wing, in particular the idea of increasing political autonomy and Poland’s influence in the European Union (as opposed to the “Westernisation of Poland” – “Polonisation of the West”).

The two antagonistic concepts of patriotism (and, accordingly, the concepts of Poland’s past) described above have given rise to mutual accusations by intellectuals from both camps that their positions on history are detrimental to Polish society and the state’s future. If for “traditional patriots” Jedwabne became the quintessence of anti-Polish sentiment, and the HP of liberal forces in the context of Polish-Jewish relations was ironically called the “pedagogy of shame” back in the 2000s, then the minimisation of Polish complicity in the Holocaust in the government’s HP after 2015 is no less sarcastically described as “the politics of innocence” (Kończal, 2024).

Professional literature also suggests that the concept of “critical patriotism” has been endorsed by the Polish central government throughout the history of modern Poland, including periods of right-wing rule. However, this statement is poorly substantiated. For example, K. Hlovatska asserts the presence of a discourse of “critical patriotism” in the HP in general and in most resolutions of the Polish parliament related to commemorating events and figures in the Polish history between 1990 and 2019. However, in her study, when it comes to the Volyn tragedy of 1943 – 1944, she did not mention the unreservedly one-dimensional decisions of the Polish parliament on these events, adopted in 2016 and 2018, in which it is difficult to see even a shred of a balanced view of the Ukrainian-Polish confrontation, let alone the presence of the discourse of “critical patriotism” (Głowacka, 2024).

What is the nature of the historical views of “traditional patriots”? According to many analysts, they are deeply rooted in Polish culture and mass consciousness, where the romantic logic of the 19th century still prevails, based on a “mixture of peripheral complexes and megalomania” (Harper, 2020, p. 132). In the collective self-reception of Poles, their homeland has long been regarded as a bastion of freedom and democracy on the European map. On the other hand, the historical imagination of the Poles clearly displays a “martyr complex”: Poland is seen as an eternally oppressed victim of foreign subjugation, exploitation and persecution, including the partitions of the country at the end of the 18th century and their culmination during World War II. In fact, the Polish conservative politicians and intellectuals who are the HP actors should be accepted as a product of the same romantic code (Harper, 2020, pp. 132–133; Kończal, 2022, p. 261). Incidentally, its enduring component is the myth of the Eastern Borderlands (Kresy Wschodnie). According to it, these territories, which are now Ukrainian, Belarusian and Lithuanian, are viewed through the prism of the messianism of the Poles, who brought high culture and civilisation there (including through military activity). The widespread “kresomania” (according to D. Beauvois) (or,

according to the Polish publicist A. Balcer, “kresimentalism”) in the mass consciousness and views of many representatives of the Polish elite gives rise to the temptation to treat the Ukrainians, Belarusians and Lithuanians with contempt/arrogance (Kalishchuk, 2020, p. 202; Harper, 2020, p. 132).

Scholars additionally highlight the cynical, instrumental character of the right-wing history policy. The instrumentalisation of the past for political gain (to win the favour of voters and mobilise them to vote) is considered in special studies to be an almost trivial practice, which, in particular, the Polish right-wing politicians have willingly and frequently used (and continue to use). As the Polish researcher J. Szrednicka aptly notes, “politicians have mastered the art of selectively drawing from the romantic reservoir, cynically plucking the most delicate social strings of romantic sensitivity over and over again to achieve their current political goals” (Harper, 2020, p. 133). When it comes to the historical memory of the Polish society and its political instrumentalisation, we are talking about related processes. On the one hand, the historical imagination of a significant portion of the Polish citizens is infused with the conservative ideas described above, so these modern Poles are inclined towards right-wing politicians and exhibit corresponding electoral behaviour. On the other hand, it is precisely politicians of this kind, who come to power owing to an electorate steeped in history, who persistently exploit the past and stir up passions around historical topics that appeal to voters, leading to even greater entrenchment of the corresponding ideas and sentiments. Therefore, it is hardly worth questioning the thesis that the historical consciousness of contemporary Polish society is “mainly” formulated by representatives of the Polish right wing (Harper, 2020, p. 145). The first important step in shaping this type of mass history perception is considered to be the modern Polish school system, which is dominated by an affirmative vision of national history (Stobiecki, 2016; Stobiecki, 2023, p. 177), and where the teaching process is primarily focused on imposing a narrow national (ethnolinguistic) view of the past on students (Jaskulowski, Majewski, Surmiak, 2022). Moreover, this appears to be a vicious circle, unfortunately. However, as K. Jaskulowski and P. Majewski show using the example of the rejection by a significant part of Poles of the official glorification of the “cursed soldiers”, there is little reason to speak of Polish society being entirely under the influence of the right-wing historical agenda (Jaskulowski & Majewski, 2024, pp. 82–96).

In professional literature, there is a widespread view that the success of the “new history policy” were also made possible by the significant support it received from the conservative section of the country’s cultural elite. Cultural figures (museum curators, educators, archivists, members of public organisations concerned with the historical memory of the Poles, etc.) share the “nostalgic” sentiments of the general public and, therefore, despite the considerable autonomy of cultural institutions in Poland, do not resist and often support the “right” HP. This is the paradox of the key institution in terms of implementing official HP, which is the Institute of National Remembrance (Instytut Pamięci Narodowej). Although this institution has always been sensitive to the government line at the HP, in terms of its legal status it is not a state authority, and until the mid-2010s it managed to maintain high standards of scientific rigour and avoid becoming a purely official “ministry of memory” (Wojdon, 2018, pp. 97–98; Behr, 2021, p. 370; Górny, 2024). However, since 2015, the Institute of National Remembrance has become the mouthpiece of the LJP and has “transformed into an agency that implements state memory policy” (Kończal, 2022, p. 257). The main reason for this transformation lies not so much in the administrative and financial levers that have always

existed and facilitated the institution's partnership with the authorities, but in the fact that a significant proportion of its staff share the paradigm of the "new history policy".

Chief focus is on the positions of professional historians who defended the official HP and those who actively opposed it. It is believed that the LJP camp's often harsh and impeccably reasoned criticism by its opponents did not prove truly effective, as it failed to halt the government's success after 2015 in imposing its own vision of history on society. According to K. Kończal, this situation demonstrated the weakness of the academic community in terms of its inability to communicate with society in a language it understands, and generally exposed the inability of professional historians to be influential in the public sphere (which reflects, in a broader sense, the traditional scepticism of academic science towards public history) (Kończal, 2020, p. 83).

When it comes to the involvement of historians in official history policy, the professional conduct of those working at the Institute of National Remembrance and other state-affiliated institutions is interpreted as somewhat forced, since, being both scholars and civil servants, they are obliged to limit their research autonomy (Behr, 2021, pp. 379–382). At the same time, it is believed that a significant portion of historians, including representatives of purely academic science, sincerely share the ideas of the right wing, and that the public activity in the field of "new history politics" of its "gurus" (such as Andrzej Nowak) and "mnemonic warriors" (such as Wojciech Roszkowski) is based on ideological, ethical and intellectual intentions. In particular, the Polish sociologist M. Łuczewski provides a detailed justification of the role of moral incentives ("moral capital") as the driving force behind HP (using the examples of modern Russia, Germany and Poland) (Łuczewski, 2017). One of his studies analyses the career of the contemporary Polish historian W. Roszkowski, mentioned above. This leading figure of the Polish conservative intelligentsia initially held apolitical/pluralistic views on Poland's past. However, over time, he consciously joined the conservative camp, aiming to be beneficial to the Polish society and to realise his considerable "cultural capital" (which includes moral authority ("moral capital") and influence as an academic historian and public intellectual ("reflective capital")) (Łuczewski, 2022). W. Roszkowski is shown as a typical representative of that part of the Polish elite that seeks "cultural capital" not in the "centres" (before 1989 – the "East", after 1989 – the centre of gravity shifted to the "West"), but at home, where it finds "local capital" represented by the nation (Łuczewski, 2022, p. 737).

According to researchers, the implementation of the HP by the LJP would not have been possible without the tacit consent and actual political support (primarily through voting for relevant decisions in the Polish parliament) of the Polish political class as a whole, including those parties that were in opposition and are considered to be entirely pro-European and liberal-oriented. The nature of this position (or rather, its absence) is apparent. As K. Kończal notes, for most of the opposition, it was too great a risk to be accused of not defending "Poland's good name" (Kończal, 2022, p. 262).²

An indisputable feature of HP by the LJP is the use of questionable/authoritarian practices, which enabled the achievement of specific and visible results (or, to be less politically correct, to push them through). This refers to attempts to introduce legal liability for disagreement with the established (in fact, official) interpretation of events in Polish history, government policy of persecuting Polish scholars who continued (and continue) to

² The unanimity of the newly elected Polish parliament in 2023, in which a pro-European majority opposed to the right wing has been formed, in supporting the "genocidal" interpretation of the Volyn tragedy and the loud silence of Polish politicians on the rapid spread of anti-Ukrainian sentiments in Poland in the fifth year of the full-scale Russia-Ukraine War, clearly confirm the validity of such observations by independent analysts.

take a critical view of the Polish-Jewish relations during the war, the opening and generous state funding of new cultural institutions that support the official historical narrative, etc. One of the most telling examples of the authoritarian nature of the history policy by the LJP is the political and media attack carried out against the Museum of the Second World War in Gdańsk (Muzeum II Wojny Światowej w Gdańsku) between 2015 and 2017. The museum's administration, headed by the well-known figure of the "critical" camp of the Polish intellectuals, historian P. Machcewicz, was accused of "insufficient Polishness", "cosmopolitanism", failure to highlight adequately "Polish heroism", and paying excessive attention to the everyday life of civilians during the war (Etges, Zündorf, Machcewicz, 2018; Stobiecki, 2023, p. 166). Ultimately, under political coercion, the museum's management was replaced by supporters of the official HP (and K. Nawrocki, later the Head of the Institute of National Remembrance (2021 – 2025) and the winner of the 2025 presidential election in Poland, became its director).

It should be noted that the authoritarian style of the "new history policy" is unprecedented in the history of the modern democratic Polish state. Therefore, according to French historian V. Behr, it "may have more in common with the practices of the Polish People's Republic than with the post-communist period" (Behr, 2021, p. 382).

Conclusions. The HP in Poland during the LJP era not only caused political and social resonance but also became the subject of scientific research. A distinctive feature of professional research into the HP of the Polish right wing is its interdisciplinary nature, which leads to an interest in various aspects and manifestations of the phenomenon. In general, the social sciences and the humanities have conceptualised it as a typical right-wing and conservative discourse, grounded in the sentiments of nostalgia for a "true Poland" prevalent among the Polish elite and broader society – one that is allegedly perceived as having been lost through communist and post-communist historical amnesia. Professional literature convincingly argues that right-wing politicians and their supporters in various social groups actively promoted the "Polish view" of history for reasons of both social appeal and political expediency. The desire to establish the right agenda generally led to the intensification of the official HP and the transfer of its main efforts to the most "painful" points of Poland's past, which was relatively successful in terms of political instrumentalisation. The phenomenon of the absence of serious opposition to the 'right-wing' turn among the traditionally influential circle of intellectuals who advocate the establishment of the European model and practices of historical memory in Poland has also been clarified. Overall, contemporary social sciences and humanities have produced analytical works on the most significant issues of the right-wing government during its time in power in Poland from 2015 to 2023. In view of this, it is timely to conduct synthetic studies on the problem.

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РЕЦЕНЗІЇ / REVIEWS

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Vasyl LOPUSHANSKYI

PhD (Psychology), Associate Professor; Head of the Department of the German and French Languages and the Methods of Their Teaching, Drohobych Ivan Franko State Pedagogical University, 24 Ivan Franko Street, Drohobych, Ukraine, postal code 82100 (w_lopuschanskyj@dspu.edu.ua)

ORCID: 0009-0008-0460-6655

Yaroslav LOPUSHANSKYI

PhD (Philology), Associate Professor; Associate Professor of the Department of the English Language and Translation Studies, Drohobych Ivan Franko State Pedagogical University, 24 Ivan Franko Street, Drohobych, Ukraine, postal code 82100 (jaro.lopuschanskyj@dspu.edu.ua)

ORCID: 0000-0002-8872-1982

Василь ЛОПУШАНСЬКИЙ

кандидат психологічних наук, доцент, завідувач кафедри німецької та французької мов та методики їх викладання, Дрогобицький державний педагогічний університет імені Івана Франка, вул. І. Франка, 24, Дрогобич, Україна, індекс 82100 (w_lopuschanskyj@dspu.edu.ua)

Ярослав ЛОПУШАНСЬКИЙ

кандидат філологічних наук, доцент, доцент кафедри англійської мови та перекладу, Дрогобицький державний педагогічний університет ім. Івана Франка, вул. І. Франка, 24, м. Дрогобич, Україна, індекс 82100 (jaro.lopuschanskyj@dspu.edu.ua)

LAND, POWER AND REVOLUTION: A NEW STUDY ON THE AGRARIAN REFORM IN THE UKRAINIAN STATE IN 1918

A peer-review of the monograph: Ruslan Pyrih, Roman Tymchenko.

“The Land Reform of Hetman Pavlo Skoropadsky: Historical Essays, Documents and Materials”. Kyiv, 2025. 344 p.

ЗЕМЛЯ, ВЛАДА І РЕВОЛЮЦІЯ: НОВЕ ДОСЛІДЖЕННЯ АГРАРНОЇ РЕФОРМИ В УКРАЇНСЬКІЙ ДЕРЖАВІ 1918 р.

**Рецензія книги: Руслан Пиріг, Роман Тимченко.
“Земельна реформа гетьмана Павла Скоропадського: історичні нариси, документи й матеріали”. Київ, 2025. 344 с.**

The monograph written by Ruslan Pyrih and Roman Tymchenko is dedicated to one of the most controversial aspects of the history of the Ukrainian State in 1918 – the agrarian

policy of Hetman Pavlo Skoropadsky and the attempt to implement the land reform under the conditions of the revolutionary transformations. There was the joint participation of two institutions – the Institute of History of Ukraine of the NAS of Ukraine and the Research Institute of Peasantry and Agrarian History of Bohdan Khmelnytskyi Cherkasy National University in order to publish the above-mentioned monograph. The monograph consists of Introduction, two parts (the first – “Land Reform of Hetman P. Skoropadsky: Historical Essays”, the second – “Documents and Materials”), a personal index and a list of abbreviations. The first part consists of nine chapters.

The authors turned to the historiographical understanding of the land policy of the Hetmanate in *Chapter 1*, “Land Reform in Modern Ukrainian Historiography. Historical Sources of the Topic”. There was made the analysis, which starts with the statement that the agrarian policy of the Ukrainian State in 1918 was evaluated ambiguously in the Ukrainian historical science, and interpretations largely depended on the political and ideological orientations of the scholars. The authors emphasized that the representatives of the conservative statist trend of the Ukrainian historiography – in particular, Dmytro Doroshenko, Viacheslav Lypynsky, Natalia Polonska-Vasylenko – generally positively evaluated the concept of land reform by P. Skoropadsky. At the same time, they tried to explain the difficulties of its implementation by the influence of the revolutionary situation, social radicalism, and the policy of the Central Rada (p. 15). In this chapter, the authors seek not only to present a list of historiographical positions, but also to show the evolution of the scientific analysis of the Hetmanate land policy. Hence, the issue appeared not as a narrow issue of agrarian history, but as a complex issue of the social, political and state-building processes of the Ukrainian revolution era. There was chief focus on critical evaluations of the reform. According to the authors, even supporters of the Hetmanate often criticized not the idea of the agrarian transformations, but the methods and pace of their implementation. Due to the above-mentioned approach, it was possible to avoid apologetics and forms a more balanced picture of the historical process. There was provided a thorough analysis on the complex of the historical sources in the chapter, which highlighted the preparation and implementation of the Hetman Pavlo Skoropadsky land reform. The authors emphasized that the topic was represented by almost all types of sources – the archival documents, legislative acts, memoirs, the press, archeographic publications and reference editions (p. 24).

The authors analyzed the foreign policy and economic factors that accompanied Pavlo Skoropadsky’s rise to power in *Chapter 2* of the monograph – “The “khlіbni” (“bread”) drivers of the coup d’État”. The very title of the chapter demonstrated the author’s emphasis: the coup of April 29, 1918, was viewed not only as the intra-Ukrainian political event, but also as a consequence of the complex interaction of the interests of Germany, Austria-Hungary, and Ukrainian conservative circles (pp. 46–50).

There was the authors’ analysis regarding the Brest Peace Treaty, which was directly related to the food needs of the Central Powers. It was emphasized that for Germany, Ukraine was primarily of strategic economic importance as a source of food and raw materials. That is why, the German military command sought to establish a stable government in Ukraine, capable of ensuring regular supplies of grain.

General Wilhelm Groener and Ambassador Alfons Mumm von Schwarzenstein played a key role in implementing this policy. Quickly they became convinced that the socialist government of the Central Council was unable to ensure stability in the country, carry out the sowing campaign, and fulfill food obligations to Germany (p. 43). The German

command was particularly dissatisfied with the Central Council's agrarian policy, based on the socialization of the land, which, in the Germans' opinion, was destroying agriculture and making it impossible to export grain on a large scale.

The authors analyzed in detail the escalation of the conflict between the German authorities and the Central Council around the order of Field Marshal Hermann Eichhorn on the mandatory sowing of fields. The Central Council regarded this document as interference in the internal affairs of the UNR, but in fact could not counteract German pressure. There was formed a conviction in German military and diplomatic circles regarding the drastic need to remove the socialist government and establish a more conservative and manageable government gradually.

There was presented the process of searching for a candidate for the new ruler of Ukraine. The German command considered several candidates, but the most acceptable figure was Pavlo Skoropadsky, who was an authoritative general, a large landowner and a representative of the starshyna-hetman family. The activity of the Ukrainian People's Community established by him was also an important factor, which became a political instrument for preparing the coup.

The authors emphasized that the coup d'état was the result of a convergence of interests between the German command and the Ukrainian conservative forces – primarily the Union of Landowners and the Ukrainian Democratic Agrarian Party. The Germans sought a stable government capable of guaranteeing food supplies, while the Ukrainian property circles sought the elimination of the socialist reforms of the Central Rada and the restoration of private property.

It was emphasized that on the eve of the coup, P. Skoropadsky agreed to a number of demands of the German command: fulfillment of the Brest Peace Treaty terms, ensuring food supplies, restoration of private property, rejection of the parliamentary system and restrictions on the creation of his own army. In return, he received the German support in establishing a new regime.

As a result, the authors concluded that the April 1918 coup and the establishment of the Hetmanate of Pavlo Skoropadsky were initiated and organized by the German military political leadership with the Ukrainian conservative forces' support. Formally, the coup had the appearance of the intra-Ukrainian process, but in fact it meant the transition of Ukraine to a regime of dependence on the Central Powers and the beginning of the occupation nature of the Ukrainian-German relations.

There was analyzed the formation of the political and agrarian views of Hetman Pavlo Skoropadsky and his vision of the land reform as a key element of state building of the Ukrainian State in 1918 in *Chapter 3* "The Views of P. Skoropadsky and the Ruling Elite on Solving the Land Issue". The authors emphasized that P. Skoropadsky viewed the agrarian issue not only as an economic one, but primarily as the basis for the political stability and creation of social support for the new state in the form of a wealthy peasantry and farms.

There was shown P. Skoropadsky's worldview evolution – from a Russian aristocrat and a large landowner to a Ukrainian statesman of a liberal conservative orientation. A significant influence on his agrarian views was exerted by the Stolypin reform, which he considered a model of the agriculture modernization through the development of private small property and farm management. At the same time, the Hetman was aware of the difference between the Ukrainian conditions and the Russian ones and saw the need for forced or ransom alienation of large landowner estates to provide land to landless peasants.

In the text it was emphasized that the land reform was to be based on the principles of the private property, state regulation of the land market, and the creation of the State Land Bank. It was envisaged the abolition of the land socialization carried out by the Central Rada, the formation of a land fund by buying up private, state, and church lands, and the sale of land plots to the peasants. At the same time, it was planned to preserve large, highly productive “cultural farms” – primarily sugar, seed, and breeding farms (p. 53).

The authors analyzed in detail the political environment of P. Skoropadsky and the government’s attitude to the agrarian reform. The reform was supported by the Chairman of the Council of Ministers F. Lyzohub, the Minister of Land Affairs V. Kolokoltsov and a significant part of the Cadet environment. At the same time, there was resistance to the forced alienation of lands among large landowners, which hindered the practical implementation of the reform (p. 58). There was a chief focus on the activities of the Ukrainian People’s Community (Ukrainska Narodna Hromada) and attempts to create a conservative political support for the Hetman regime.

In the chapter there were also showed the contradictions of the Hetmanate’s agrarian policy. On the one hand, the authorities declared the need to transfer the land to the peasants and liquidate large latifundia, and on the other, they restored the right of the landowners’ private property legislatively and adopted a law on the land liquidation commissions, which allowed the landowners to demand compensation for damages. The above-mentioned exacerbated the social conflict in the countryside and effectively blocked the reform implementation until the end of 1918 (pp. 60–62).

In general, due to the Chapter 3 of the monograph, it is possible to understand the internal logic of the Hetmanate’s land policy, it shows the complexity of finding a compromise between the state interests, economic efficiency and the social demands of the peasantry. The authors convincingly demonstrated that P. Skoropadsky’s agrarian reform was an attempt to modernize the land relations in an evolutionary way, but the political instability and revolutionary nature of the era limited the possibilities of its implementation significantly.

The preparation and first steps in implementing the land reform of the Ukrainian State during the Hetmanate of Pavlo Skoropadsky were highlighted in *Chapter 4*, “Government Activities in Preparing the Legislative Framework for the Reform”. The leading role in reforming the agrarian relations was assigned to the Ministry of Land Affairs, headed by Volodymyr Kolokoltsov. His appointment triggered a sharp criticism by the Ukrainian socialist and national forces, as well as opposition among some ministry officials, which was accompanied by the strikes and a campaign of discredit (pp. 63–64).

Despite the political conflict, the government began to form a legislative framework for the land reform. Its main goal was to provide land to the landless peasants by purchasing part of privately owned land by the state and selling it to the peasants with help of the State Land Bank. At the same time, the Hetman’s government sought not to eliminate large landownership, but to create social support for the regime among the wealthy peasantry.

A special land commission was created with the participation of the government officials, agricultural scientists, and German specialists in order to prepare the reform. In its work, there clashed two approaches: a conservative one, which advocated the preservation of large estates, and a liberal one, aimed at limiting landlord land ownership. Initially, the government supported a moderately reformist direction.

There were passed a number of laws, which regulated the right to the harvest, the purchase and sale of the land, the activities of the land commissions, and the procedure

for the restoration of landlord estates in May–August 1918. The land ownership norm was determined: no more than 25 desiatyn per person, but the mechanisms for implementing this norm remained undeveloped. There were not regulated issues on forced alienation of the land, pricing, and the functioning of the land market (p. 67).

A significant problem was the contradiction between the government's reformist intentions and the policy of restoring the rights of large landowners. The Law on Land Liquidation Commissions actually provided the landowners with the opportunity to return their estates and compensate for losses, which caused mass discontent among the peasantry and the strengthening of the insurrectionary movement. De facto, the Land Commissions, which were meant to be the arbitrators, often turned into a tool of pressure on the peasants.

There were additional factors, which hindered the reform: the weakness of the administrative apparatus, personnel shortages, lack of funding, conflicts between the government officials, and dependence on the German-Austrian occupation administration. An important element of the reform was to be the State Land Bank, but its creation was delayed, and the financial capabilities were limited (pp. 68–69).

As a result, the authors made a conclusion that the land reform developed quite actively at the legislative level in May–July 1918, but by the end of the summer it had reached a dead end efficiently. The main reasons for this were the lack of a real mechanism for land redistribution, the contradictions between the interests of the peasantry and large landowners, the repressive nature of local politics, and the unfavorable international and domestic political situation (pp. 71–72).

There were analyzed the contradictions of the agrarian policy of the Ukrainian State under Hetman Pavlo Skoropadsky and the influence of large landowners and industrial financial circles on the course of the land reform in *Chapter 5* “The Opposition of Right-Conservative Circles to the Transformation of the Land Legal Relations”. The authors showed that the principle of the inviolability of the private property proclaimed in the Hetman's Charter came into conflict with the intention to alienate large estates in favor of small-land peasants. It was this contradiction that became decisive for the entire subsequent land policy of the Hetmanate.

The central role in blocking the reform was played by the All-Ukrainian Union of Landowners, which represented the interests of the landowners and demanded the full restoration of their property rights, the return of the land, compensation for losses, and the preservation of large landholdings. Despite supporting the Hetman's coup, the union gradually turned into an influential force that systematically resisted the government's reformist intentions. A similar position was taken by PROTOFIS, which united the industrial and financial elite and advocated the protection of large property, a centralized “yedyna Rosiia” (“United Russia”, and a conservative socio-economic course (pp. 74–76).

In the text it was traced how the representatives of these organizations tried to influence the formation of the government, local administration and legislation. There was created an administrative mechanism regarding the return of the estates to their former owners due to the starost (elders) appointment from among the landowners and former officials. The state authorities actually supported the restoration of the pre-revolutionary land relations, using the administrative apparatus and even military force to protect the interests of the landowners (pp. 76–78).

The focus was on the struggle around the draft laws of the land reform. The landowner circles consistently sought participation in the development of all agrarian laws and blocked any attempts at the forced alienation of large landholdings. Although the government

commissions developed projects aimed at creating the peasant landownership and limiting latifundia, under pressure from the large-land lobby, these initiatives lost their radical character or were not implemented at all (pp. 79–81).

The authors also depicted the contradictions within the government itself: some government officials and experts were cognizant of the need for the forced redemption of large estates in the reform's sake, but there was not enough political will to make the appropriate decisions. There was offered significant resistance not only by the landowners, but also by the sugar millers and tenants, who were afraid of the loss of their economic positions. As a result, the land reform was never completed, and the dominance of the interests of large property became one of the factors of the crisis and weakening of the Hetmanate at the end of 1918 (pp. 82–84).

There was analyzed the reaction of the Ukrainian peasantry and workers to the establishment of the Hetman regime of Pavlo Skoropadsky after the coup d'état of 1918 in *Chapter 6* "The Peasantry's Reaction to the Restoration of Large-Land Ownership". The authors stated that the new government resorted to the repressive measures immediately: there were banned the peasant and workers congresses; there were restricted the democratic freedoms; there was restored private ownership of land, and there were persecuted opposition organizations and the press. The above-mentioned caused a wave of protests in various regions of Ukraine, especially among the peasantry, which perceived the Hetmanate's policies as a threat to the loss of the gains of the revolution and the return of landlord landownership (pp. 87–88).

In the text it was emphasized that at the initial stage, the population attitude to the new government was not unambiguous: part of society supported the Hetmanate or took a wait-and-see approach. At the same time, the poorest sections of the peasantry quickly became disillusioned with the restoration of the landlord rights and the activities of the land liquidation commissions, which actually contributed to the return of the estates and the collection of compensation from the peasants. Due to the actions of the German and Austro-Hungarian troops, which supported the Hetmanate administration and participated in the punitive operations, there exacerbated significant dissatisfaction (p. 89).

The authors covered in detail the development of the peasant uprising in the summer of 1918. The largest uprisings were the Lubensko-Zolotoniske uprising, the Kanishka uprising and especially the Zvenyhorodsko-Taraschany uprisings, during which the rebels created their own governing bodies, headquarters and armed formations. The German and Austro-Hungarian command was forced to use significant military forces, artillery and mass repressions in order to suppress these uprisings. The uprising covered most of the regions of Ukraine and took on the character of a broad peasant war against the landlords, occupation troops and the Hetman's power (pp. 90–95).

The focus was on the role of the political forces in the peasant movement. The greatest influence on the organization of the uprisings was exerted by the Borotbists, the Ukrainian Socialist Revolutionaries, the Peasants' Union, and in some areas by the Bolsheviks, the Left Socialist Revolutionaries, and the anarchists. The authors emphasized that the demonstrations were mostly spontaneous and were not properly coordinated on an all-Ukrainian scale.

At the end of the chapter, the conclusion is made that the mass insurgent partisan movement was a natural reaction of the peasantry to an attempt at the socio-economic restoration and the restoration of the landlord land ownership. At the same time, the authors warned against exaggerating the scale of the movement and evaluate critically some historiographical calculations of the number of the insurgents and losses. The main reasons for the defeat

of the peasant uprisings are the presence of powerful occupation troops, coordination of their actions with the Hetman's authorities, the absence of a single leadership center of the uprising, and the heterogeneity of the peasantry itself.

There were analysed the relations of the Ukrainian State of Hetman Pavlo Skoropadsky with Germany and Austria-Hungary after the coup d'état of 1918 in *Chapter 7* "Pragmatic Interest of German and Austrian Allies". The authors stated that the Central Powers supported the change of power primarily to ensure stable supplies of the Ukrainian food and raw materials. The German government denied interference in the internal affairs of Ukraine publicly, but in fact the military command, diplomatic representatives, and economic structures actively influenced the political course of the Hetmanate, especially in the agricultural and food sectors (pp. 97–99).

It was emphasized that the relations between the Ukrainian government and the allies were formally of a partnership nature, but were unequal due to the dependence of the Hetmanate on the German-Austrian military support. The German side controlled the formation of certain directions of the domestic and foreign policy, demanded the implementation of the economic agreements and interfered in the preparation of the land reform. The basis of the agrarian policy was proclaimed to be the restoration of the private ownership of land with the preservation of the large farms and the gradual redemption of the land by the peasants.

The authors covered in detail the involvement of the German diplomats, military and economic advisors in drafting the land legislation, regulating grain procurement and setting fixed grain prices. At the same time, the Allies sought to prevent the destruction of large landowner farms before the harvest was complete, since they were seen as the main source of grain for export. Hence, the peasantry was discontented and there increased the social tension (pp. 100–101).

In the text the focus was on the forced methods of the food procurement. The German and Austro-Hungarian military structures used the requisitions, indemnities, military pressure and punitive measures against peasants. These actions were particularly harsh in the Austro-Hungarian occupation zone. The occupation administrations created their own networks of the grain procurement bodies, used the military units to ensure the harvest and force the peasants to fulfill food deliveries (pp. 102–103).

There was also analyzed the economic negotiations between the Ukrainian State and the Central Powers in the Chapter. Due to the slow delivery of supplies, Germany and Austria-Hungary increased pressure on the Ukrainian government. Hetman Pavlo Skoropadsky's visit to Germany had not only diplomatic but also economic significance in September 1918: as a result, a new tripartite economic agreement was concluded, which provided for large-scale supplies of grain, livestock, sugar, alcohol, and raw materials to the Central Powers.

At the end of the monograph, the authors concluded that the policy of Germany and Austria-Hungary in Ukraine was determined primarily by the desire to ensure their own military and economic needs. Despite the support for the Hetmanate regime, there was constant interference in the internal affairs of the state, control over the agrarian reform and the use of the forced methods of grain procurement. It contributed to the aggravation of the conflict between the authorities, the peasantry and the occupation forces and weakened social resistance to the Hetmanate (p. 114).

There was studied the transformation of the Ukrainian political environment after the coup d'état of April 29, 1918, and the establishment of the Hetmanate of Pavlo Skoropadsky in *Chapter 8* "Ukrainian Political Parties: Attitudes to the Government's Land Policy".

The elimination of the Central Rada led to a regrouping of the political forces, forcing the Ukrainian parties to determine their attitude to the new regime, to develop new tactics and forms of the struggle. The majority of Ukrainian socialist parties found themselves in the opposition to the Hetmanate's government because of its conservative liberal course, restrictions on democratic freedoms, and orientation toward large landowners.

It was illustrated that initially the Ukrainian parties tried to have influence on the government by the legal methods: through negotiations with the German command, memoranda, demands for the "Ukrainization" of the government and the creation of the representative bodies. At the same time, there intensified the ideological contradictions within the parties. The above-mentioned was especially acutely manifested in the Ukrainian Party of Socialist Revolutionaries, where occurred a split between the moderate current and the Borotbists, who advocated underground activities and an armed uprising. There were other parties, for example, USDLP, UPSF, UPSS, UDBP, which also criticized the Hetman's regime, but differed in the degree of radicalism and vision of the state development paths (pp. 116–117).

The analysis on the parties' attitude to the land reform had special place in the text. The very agrarian issue itself became the central topic of the political struggle and the party discourse. The Ukrainian socialist forces opposed the restoration of the landlord land ownership and criticized government bills as an attempt to preserve large estates and limit the peasant representation. There was supported the idea of creating small peasant property by moderate parties, but, those parties did not offer radical mechanisms for the forced alienation of the land mostly. Gradually, with the aggravation of the peasant uprisings and the crisis of power, even moderate forces began to lean towards the need for the forced redemption or liquidation of large latifundia (pp. 119–123).

The authors emphasized that the opposition to the Hetmanate in May-August 1918 remained relatively moderate and mostly loyal to the German occupation authorities. Its activities were reduced to the political pressure, public criticism of the government and attempts to influence the personnel composition of the Cabinet of Ministers. The Ukrainian National-State Union was established in order to coordinate actions, and later the Ukrainian National Union, which united a wider range of parties and public organizations. The above-mentioned formation turned into the centre of the anti-Hetman opposition gradually (pp. 124–125).

The final part of the chapter there was depicted the radicalization of opposition movement in the autumn of 1918. The defeat of the Central Powers in World War I and the weakening of the external support for the Hetmanate contributed to the transition of the opposition from the legal forms of activity to preparations for the overthrow of the regime. The leaders of the Ukrainian National Union focused on the change of power and the formation of a pro-Ukrainian government increasingly, and the land reform issue receded into the background gradually in comparison with the struggle for the political future of the Ukrainian state (pp. 126–127).

The authors studied the final stage of attempts regarding the implementation of the land reform in the Ukrainian State in the autumn of 1918, focusing on the activities of the new Minister of Land Affairs V. Leontovych, intra-governmental contradictions, and the gradual winding down of the reform process against the backdrop of the general political crisis of the Hetmanate in *Chapter 9* "Attempt to Reanimate Land Reform".

P. Skoropadsky managed to retain control over the formation of the Cabinet of Ministers after the October government crisis, although some representatives of the Ukrainian National Union were included in the government. At the same time, the UNS remained in opposition to the Hetman's power. The authors emphasized that even a partial renewal of

the government did not eliminate the main problem – the lack of public compromise on the agrarian policy (p. 130).

The focus was on the role of the German general W. Groener, who considered the land reform as the key condition for stabilizing Ukraine. It was emphasized that the reform should not have been carried out according to the socialist scenario of the Central Rada, but through the preservation of the private property and the formation of a strong peasant economy. Hence, the authors stated that even the German military political leadership realized the impossibility of the regime's further existence without resolving the land issue.

The activities carried out by V. Leontovych as Minister of Land Affairs were the highlighted in the fragment extensively. The authors characterized him as a supporter of moderate but decisive agrarian reform aimed at the liquidation of large latifundia and the creation of a layer of wealthy peasantry. The Minister directly acknowledged the abnormality of the excessive concentration of the land in the hands of large owners and allowed the possibility of the forced alienation of estates in an interview with the press. At the same time, he remained a supporter of private ownership of the land and evolutionary reform of the agrarian relations (pp. 131–133).

In detail the authors traced the contradictions between the reformist intentions of V. Leontovych and the position of conservative landowner circles. The All-Ukrainian Union of Landowners actually blocked the work of a special land meeting and opposed the forced alienation of landlord lands (p. 134). In the text there was presented the process of division within the agricultural environment itself between large landlords and supporters of democratic agrarianism, who supported the restriction of large landownership and the development of small and medium-sized peasant farms.

The analysis on the legislative developments of the last weeks of the Hetmanate's existence played a vital role. A reform project was developed, with the participation of Ye. Chykalenko, V. Kosynskyi, K. Vobly and the others, which provided for the forced purchase of large estates by the state through the State Land Bank with the subsequent sale of the land to the peasants in small plots (p. 132). However, the authors emphasized that the above-mentioned project had been never considered by the government due to the rapid aggravation of the political situation.

The psychological and political change in the behaviour of P. Skoropadsky was especially emphasized. If at the end of October the Hetman still demonstrated interest in completing the reform, then after the defeat of Germany and the beginning of the search of the alliance with the anti-Bolshevik Russia, his attention completely switched to the issues on preserving the state power. The authors considered this to be one of the key moments in the actual winding up of the land reform.

The agrarian reform had lost any real prospects for implementation by November 1918. Although the State Land Bank, land commissions and a number of draft laws were created, the state was unable to form a sufficient land fund to provide the peasants with the land. The lack of political will for the forced alienation of the landlord latifundia made the reform virtually unviable.

The authors also drew attention to the structural problem of the land shortage in Ukraine. According to V. Kosynskyi and other agrarian specialists that even a complete redistribution of large land holdings could not solve the land scarcity issue radically. The above-mentioned enabled the authors to go beyond the limits of a purely political analysis and show the objective economic limitations of agrarian reform. (p. 138).

In conclusion, the scholars concluded that the main reason for the failure of the Hetmanate's land policy was the contradiction between the evolutionary model of reform and the revolutionary expectations of the peasantry. P. Skoropadsky's desire for a compromise between large landowners and small-land peasants turned out to be unfeasible under the conditions of the revolution, social radicalization and the rapid collapse of the political system. Even the developed mechanisms of the reform remained mostly at the level of projects, and the Ukrainian State lost the opportunity to complete the agrarian transformations due to its own political crisis and the fall of the regime in December 1918 (p. 140).

It should be mentioned that the documentary sources involvement is of great scientific importance, for example, the government decrees, official correspondence, memoirs, materials from the periodical press and archival documents. It is the richness of the sources that ensured a high level of argumentation of the monograph. The authors were not limited to the declarative evaluations, but seek to confirm their conclusions with the specific documentary evidence.

The style of the monograph combines academic restraint with a sufficiently expressive author's position. One can feel the desire of the scholars to revise the traditionally negative evaluations of the Hetmanate, characteristic of the Soviet historiography, and to show the reformist potential of the government of P. Skoropadsky. At the same time, this desire does not turn into an uncritical apology, since in the monograph there is a sufficient focus on the internal contradictions of the agrarian policy and its practical miscalculations.

In the conclusions of the monograph, the authors concluded that P. Skoropadsky's land reform failed due to the inability to overcome the antagonism between the right of the private property and the land hunger of the peasantry under the foreign occupation. The monograph written by Ruslan Pyrih and Roman Tymchenko is the role model in the scientific publication, which, owing to the combination of in-depth analysis and the publication of the unique documents (Part II), fills a significant gap in the history of the Ukrainian State in 1918.

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Друкарня – Видавничий дім «Гельветика»
65101, Україна, м. Одеса, вул. Інглезі, 6/1
Телефон +38 (095) 934 48 28, +38 (097) 723 06 08
E-mail: mailbox@helvetica.ua
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