

Methodology of the Complex Analysis of Statistical- Information Collections (Exemplified by “Kharkiv Calendar”, 1869-1917): Study Experience

Oleksii Yankul

V. N. Karazin Kharkiv National University, Kharkiv, UKRAINE
P. T. Tronko Centre for Area Studies

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Abstract

The present research deals with the publication “Kharkiv calendar” as one of the specific sources of local history. It should be rightfully attributed as a separate type of periodicals – “statistical-information collection”. Similar publications were spread in almost all regions of the Russian Empire in the 19th and early 20th centuries and were named “calendars” or “memorable books”. They have their own specifics and therefore need special approach for their study. According to his own experience, the author presents certain directions of investigation of these sources. It may be suggested the following steps of work with them: identifying of the specificity and transformations of the structure of these sources (separation of traditional and novel rubrics); analysis of balance between local, all-imperial and worldwide data (there was dynamics of this information); classification of scientific and popular-science materials; periodization of functioning of periodicals; focus on specificity of gathering of statistical information that had published in these collections.

Keywords: “Kharkiv calendar”, statistical-information collections, historical source, complex analysis, methodology.

1. Introduction

New local periodicals – commemorative books (or calendars) first appeared in the 30s of the 19th century, with the advent of provincial statistical committees in the Russian Empire. The first such commemorative book was published in Orenburg. Later, especially during the reforms of Alexander II, when interest in statistics increased, such publications were in almost every province. Provincial statistical committees, headed by governors, compiled these collections. And it was after the reform of such institutions in 1860 that these publications began circulating throughout the Russian Empire. The contents of the commemorative books reflected the specifics of the region where they were published. They contained statistics, a variety of local information, the address book of institutions and leaders, as well as popular science materials on the history of the region, geography, etc. In fact, they absorbed elements of many periodicals: magazines, almanacs and so on. Such collections were published once a year. Their appearance is a reliable marker of the development not only of statistics as a science, but also an indicator of cultural and educational development of society as a whole, in the regional dimension as well.

In 1862, similar publication “The Commemorative Book of Kharkiv Province” appeared in Kharkiv. A total of 7 issues of this collection were published (the last one was in 1868). This edition preceded the emergence of “The Kharkiv Calendar for 1869” in 1868 and was its continuation (a total of 49 issues were published).

In addition, in 1887 a separate supplement to “The Kharkiv Calendar” appeared with popular science articles – “The Kharkiv Collection” (12 issues were published). The collection ceased to exist in 1917 due to revolutionary events in the Russian Empire. Thus, our work amounted to 68 volumes of publications.

The emergence of “The Kharkiv Calendar” intensified competition between provincial and city institutions involved in the collection, processing and publication of statistics. The need for statistical information has led to the emergence of such periodicals and non-periodic publications. In Kharkiv, there were more or less successful attempts to create publications similar in their direction, goals and objectives (for example, “The Kharkiv People’s Calendar”, which appeared in 1895 as a private publication but did not exist for a long time). They differed from each other primarily in the target audience, methods of collecting information, the price of publications (usually cheaper than the publications of Kharkiv Provincial Statistical Committee), and others.

The unique information contained in each of the 7 issues of “The Commemorative Book of Kharkiv Province” and 49 issues of “The Kharkiv Calendar”, having lost its direct significance over time, has gained important historical and, in part, historiographical significance. Today, the data of these collections and related publications are used by almost all historians and local historians of Slobidska Ukraine, as well as those interested in the history of Kharkiv region of the second half of the 19th – early 20th centuries.

However, we can use “The Kharkiv Calendar” data more consciously and effectively more than 100 years after its cessation, only applying methods of collecting information, forms of its presentation and features of the Kharkiv Provincial Statistical Committee of that time.

Nowadays, “The Kharkiv Calendar” is an important source of the regional history of that period, giving specialists the opportunity to extract various topics for further research, to clarify specific facts from its pages, as well as to create generalizing works on the history of Kharkiv, Ukraine and Russian Empire.

It is worth noting that today there is no clear method of working with commemorative books and calendars. This topic is new for Ukraine and it is poorly developed. This situation has arisen because the source experts did not pay much attention to sources for a long time (perhaps due to the large volume of publications, which sometimes reached more than 800 pages), and even more so, did not single them out as an independent type of periodicals (statistical information collections).

Thus, the purpose of our article is to suggest some areas of work with such publications based on our own research experience of “The Kharkiv Calendar”. The task of our work is to show the specifics of statistical and information publications on the example of “The Kharkiv Calendar”, highlight the features of their structure, show specific research results obtained through a comprehensive analysis of this source and, thus, provide practical advice to specialists, dealing with similar issues.

2. Method

The methodological basis of our study is the principles of objectivity, historicism, systematicity, comprehensiveness and integrity of the source.

We include problem-chronological and illustrative methods of presenting the material. According to the first method, we were able to present the material in direct chronology, taking into account the problematic issues characteristic of different times of “The Commemorative Book of Kharkiv Province”, “The Kharkiv Calendar” and existence of “The Kharkiv Collection” (for example, structure of publications, thematic content, etc.).

The illustrative method helped highlight a number of issues related to the organization of work on the collections by its compilers, based on specific examples from sources, to emphasize some characteristic topics in publications, and so on. In addition, using the illustrative method, we drew up diagrams showing the ratio of general imperial and local information in the collections.

In our research, we used special historical methods, including a historical-comparative, historical-genetic, historical-typological ones. The historical-comparative method made it possible to compare the contents of “The Commemorative Book of Kharkiv Province” and “The Kharkiv Calendar” at different times of their existence. This allowed us to compare the publication at the time when its printing was headed by different editors, to identify differences in the strategy of compiling content. The authors also determined the ratio of general to the imperial information in the collections and analyzed its dynamics.

Using the historical-genetic method, we were able to investigate the transformation of statistical and information collections’ content, determine their essence and explain the reasons for this. We also identified certain (in some cases – wide-ranging) changes in the repertoire, which continued almost throughout the life of the publications. Using this method, the authors determined three periods in the existence of “The Kharkiv calendar”: 1) formation, 2) heyday, 3) sustainable development and gradual decline.

The historical-typological method allowed us to single out a number of features characteristic of the editions that preceded “The Kharkiv Calendar”. Using this method, we have identified the characteristic features of commemorative books and calendars of the Russian Empire since the mid-nineteenth century to 1917. We also managed to enter “The Kharkiv Calendar” (respectively, and all other similar publications) in the existing typology of periodicals as a separate statistical information collection, thus clarifying this classification.

The authors used elements of structural and functional analysis in their work. Applying the structural analysis, we studied “The Kharkiv Calendar” and similar publications to better understand their internal logic, to determine the features of its architecture. With functional analysis, we have distinguished functions of the sections of the collections - the official and unofficial part, found relevant and historical information, etc. Moreover, we established the functions of the collection performed in the society at different times. Thus, during its existence, the collection highlighted relevant information for that period and, accordingly, performed information, reference and educational functions (the latter is more relevant to a separate application – “The Kharkiv Collection”).

3. Results and discussion

A comprehensive approach to the study of certain problems is quite relevant. Using a variety of methods, approaches and techniques, often an interdisciplinary approach, researchers can partially solve certain scientific problems (Aliassova & Ilyassova, 2016; Ilyassova & Aliyassova, 2017). The analysis of periodicals in this regard also plays an important role, as they are a valuable source for studying the processes in a particular region of the country (Garnysheva & Khusnutdinova, 2020). In our case, the complexity of the source study allowed us to reveal certain structural features to obtain a full picture of its existence.

Having studied the term “calendar” (in the sense of reference books) (Tolmachev, 1973; Smirnova, 1990; Ryabets, 2012), the authors offer their own version of the definition, which applies to calendars and commemorative books published by provincial and regional statistical committees of the Russian Empire in the second half of the nineteenth – early twentieth century. Thus, we believe that calendars (or commemorative books) are periodical statistical and informational editions published by the provincial statistical committees of the Russian Empire mainly in the second half of the 19th – early 20th centuries. They included various statistical tables and data on a particular area, supplemented by various information materials (popular science articles, data on institutions, organizations that operated within the province or region, etc.). In fact, such collections can be attributed to the category of documentary heritage of the Russian Empire, existing alongside archival materials. We find this approach to the study of periodicals in other contemporary authors (Benitez, Zaldua & Vigil, 2018).

There are different approaches to the classification of periodicals. They can be classified, for example, by place of publication, by thematic focus, by ideological context, etc. (Kyuux & Kutsyk, 2020). Considering some existing classifications of periodicals and, in particular, calendars (Alexandrova, 1990), we cannot fully attribute “The Kharkiv Calendar” to any of them. In our opinion, calendars (or commemorative books) published by provincial statistical committees during the 19th and early 20th centuries are a separate type of periodicals that can be described as “statistical information collections” (Yankul, 2020a). This is explained by the fact that this collection combined elements of both a statistical publication and a magazine, almanac, popular science collection, etc. At the same time, the main part of such collections included various statistical data. Consequently, in our chosen definition, statistics come to the fore, while other information is a supplement to the general concept of the collection.

When working with this type of periodicals, you should take into account their specifics. The content of commemorative books and calendars is diverse and covers almost all spheres of life in the society of that time. In the case of “The Kharkiv Calendar”, we state that its content structure constantly changed throughout its existence. There were the so-called “traditional” headings and those that were added (or excluded from the structure).

Permanent headings (or departments) in “The Kharkiv Calendar” were “Menology”, which published various church data, “Financial Department”, which contained information on financial institutions in Kharkiv and the province. There was “Statistical Department” too, which contained statistical tables on population, factories and plants, indicators of agriculture, etc., “The Address Calendar” contained a list of institutions, addresses and officials, “Announcements” placed advertising. All other headings in the publication (such as “Medical Department”, “Literary and Scientific Department”, etc.) were added and disappeared at different times.

Due to this scope of information, the publication can be useful for historians and local historians dealing with various issues, from ethnography to the history of statistics. Since statistical data formed the basis of the collections, working with them you should pay attention to the method of collecting material by various statistical committees, as well as forms with questions about demographic statistics. We should also note that the data from various provinces and regions can be different, when compared with other statistical sources. Therefore, such figures should be treated with caution.

Working with this source, we should pay attention to the ratio of imperial and world information to the local information. According to our observations, there was dynamics of such information first in “The Commemorative Book of Kharkiv Province” and then in “The Kharkiv Calendar” (Yankul, 2020b). Figure 1 shows the results of our study of these dynamics.

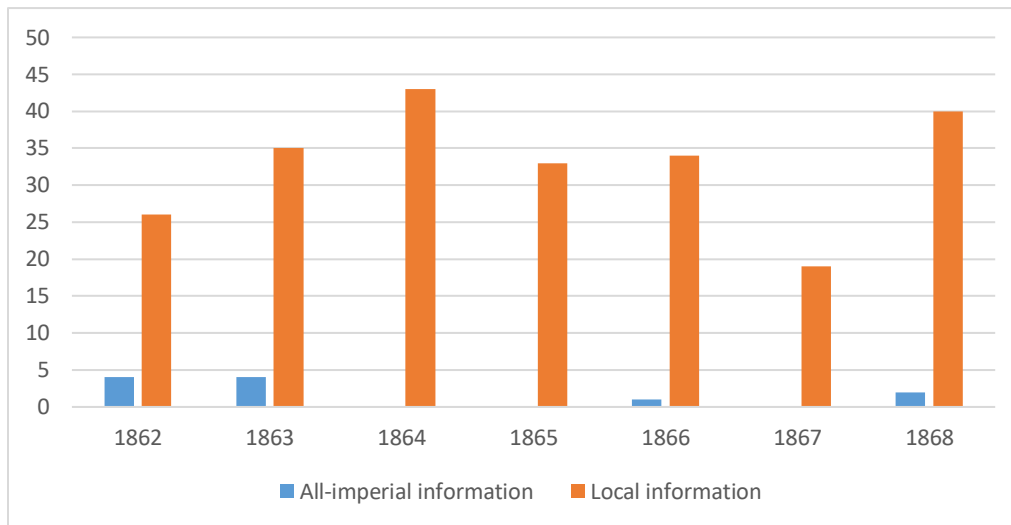


Figure 1. Ratio between general imperial and local information on the pages of “The Commemorative Book of Kharkiv Province” (1862-1868)

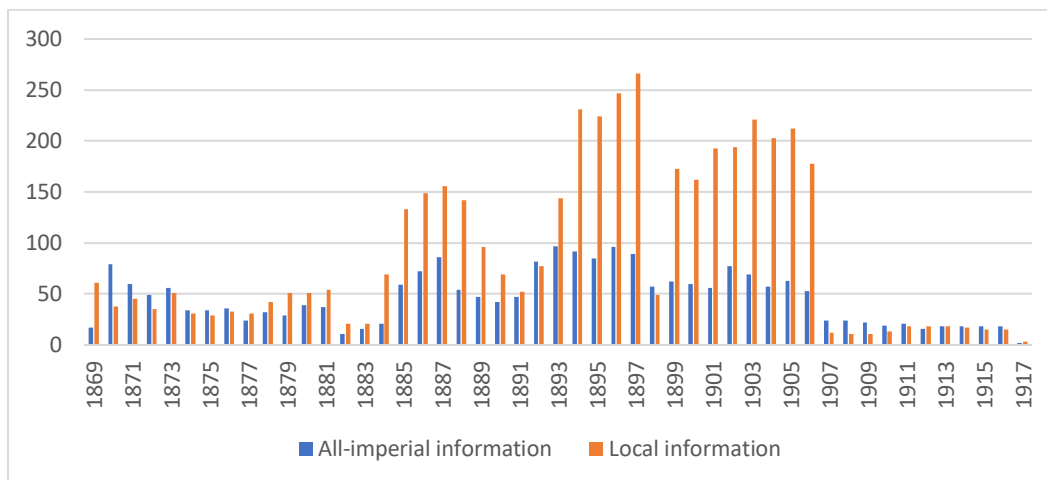


Figure 2. Ratio of general imperial and local information on the pages of “The Kharkiv Calendar” (for 1869-1917)

Having analyzed the relationship between these types of information, we have found that general information was “mandatory” and did not differ in the variety of materials. The purpose of such data was to make mandatory up-to-date information available to the public. As a rule, it was common to all such publications of the empire. Instead, local data had a wider range of content, included diverse information (in particular, popular science articles on the history, nature of the region, etc.). While general materials concerned only specific spheres of the society (religion, finance, etc.), the local data highlighted almost all spheres of life of the local population. Until the 1880s, the publications contained a large amount of general information, while local information prevailed mostly due to calendar addresses. However, the amount of local information gradually grew with each issue. In the 1880s, the situation changed a little as more statistics and popular science were added to local data. From the 1890s the information in the publication began to decline, some sections were replenished (merged or shortened), and from 1907 presentation of the material in the collection became more concise, making it narrowly focused (more statistical than informational). Nevertheless, “The Kharkiv Calendar” remained a mass edition, aimed primarily at various segments of the educated population of Kharkiv and the

province, providing up-to-date information, both statistical and informational, and popular science. These materials are now of historical value, as are many other publications that may have been less popular at the time of their existence (Maslak-Maciejewska, 2018).

In addition, researchers, working with this source, should pay special attention to scientific and popular science publications (if any). These publications can also be classified by subject, as these works are of considerable interest and can be used to cover issues related to historical events, economic development of the region, the state of nature, etc. We should keep in mind that the amount of material in the calendars of different provinces depended, among other things, on local capabilities, as not all provincial statistical committees had a sufficient material base and human resources (unlike Kharkiv) to conduct thorough local surveys. In this case, Kharkiv university played a key role. Some of its representatives and students took an active part in the work of Kharkiv Provincial Statistical Committee and in compiling “The Commemorative Book of Kharkiv Province”, “The Kharkiv Calendar” and other publications. Among such figures we can name the historian and public figure Dmytro Bagaliy (1857-1932); the economist, statistician and public figure Olexander Rusov (1847-1915); the ethnographer, literary critic, art historian and museum figure Mykola Sumtsov (1854-1922), and many others. Because of the fruitful work of the committee on this publication, Kharkiv and Koven provinces shared the second place in the number of published collections (together with supplements, their number reached 72 copies) in the Russian Empire. Vilna province took the first place with 119 similar published collections (Balatskaya & Razdorsky, 2008).

There was no clearly defined structure for commemorative books and calendars at that time. Therefore, the provincial statistical committees determined it independently, depending on the region and the staff of the institution. This resulted in structural transformations of publications. In the case of “The Commemorative Book of Kharkiv Province” and then “The Kharkiv Calendar”, changes in the content of publications continued until almost the 1900s, as various secretaries of the Kharkiv Provincial Statistical Committee and its members tried to invest something new in the publication to improve it. At the same time, the experience of other provinces and oblasts in this matter could have been taken into account because the institutions exchanged the publications. There was implicit competition between the provinces for the publication of statistical information collections, so due to these publications each committee tried to show the province as widely as possible, giving more information. Other authors are now analyzing the peculiarities of local periodicals, too. Thus, we can put periodicals in the local context and better understand certain features of the region (Teixeira, 2020).

Working with the publication, it is worth highlighting the periods of its existence. Like any publication, “The Kharkiv Calendar” has gone through several stages of its development. We offer a conditional periodization of these processes (taking into account “The Commemorative Book of Kharkiv Province”):

- 1862 – until the 1880s – a period of the publication formation (including – “The Kharkiv Calendar” as an independent one), a long search for information content;
- 1880s – to 1900s – a period of the publication “prosperity”, growing popularity and final expansion in terms of the content. We should especially mention the issues (for 1884-1887) under the editorship of Petro Yefimenko (1835-1908), secretary of the committee, historian, ethnographer, and public figure. During this period, the “Calendar” focused not only on statistics, but also on a number of analytical materials (respectively, there was a scientific reference or literary-scientific department). Gradually, some of these materials accumulated. Thus, in 1887, there appeared a supplement to “The Kharkiv Calendar” – “The Kharkiv Collection”, which contained ethnographic, historical and local lore pages.

The last period in the development of “The Kharkiv Calendar” continued from 1900 to 1917. We can define this period as a gradual decline. It turned out that its content was almost

unchanged, and in some cases even reduced, fewer companies and institutions placed their ads there, and so on. This can be explained by the difficult general imperial situation: the financial crisis of the early twentieth century, the Russian-Japanese War in 1904-1905, the First Russian Revolution in 1905-1907, the First World War in 1914-1918, the revolutionary events of 1917, etc.

During the First World War in Kharkiv, all periodicals were subject to partial censorship after publication, carried out by the inspector of press (he was accountable to the governor or governor-general) (Kirienco, 2016). This fact could also have led to the decline of “The Kharkiv Calendar”, as the governor was the chairman of Kharkiv Provincial Statistical Committee, and some information on the collection pages was banned from publication. Among other things, at that time, information of a military nature (addresses of military units, military, etc.) disappeared from the pages of “The Kharkiv Calendar”.

Statistics as a subject of study is of great interest to researchers around the world (Senra, 2008), but in our case it was not the main topic of the research. We only drew attention to some of its features presented in “The Kharkiv Calendar”. Statistical tables are an important part of commemorative books and calendars of the Russian Empire. Therefore, working with them is also important for the analysis of the collections. We should say that some statistics (usually published in a special “Statistical Department”) given in “The Kharkiv Calendar” (including demographic data), is not very reliable as we see different figures, while comparing data with the All-Russian census. “The Kharkiv Calendar for 1899” gave the figure of 2,650,022 inhabitants of Kharkiv province, while according to the All-Russian Census it was 2,492,316 of the current population and 2,507,277 of the permanent population (Troinitsky, 1904).

This discrepancy can be explained by different methods of collecting and processing materials. Kharkiv Provincial Statistical Committee collected the population data annually in the course of the so-called “one-day census”. For this procedure, there were special questionnaire forms distributed by the committee members and volunteers to houses and apartments. At the same time, questions for houses and apartments differed. The discrepancy may be due to the fact that the Kharkiv Provincial Statistical Committee used data from all officially registered persons in the province, while the general census was conducted by a direct survey of the population. Some of the residents could go to work in other provinces or study, and so on. Therefore, the difference in the method of counting the local population gave different results.

However, the statistics given in the collection is of great value as it can be used to trace the dynamics of the population in Kharkiv and the province, industry and education development, gradual growth of church parishes, agricultural development, etc. The main range of statistics published in “The Kharkiv Calendar” in each issue related to the territory and population of Kharkiv and the province. These data were submitted by individual departments. For example, the population data were organized by religion, social status, place of residence, and gender, too. The counties usually served the territory of the province. In contrast to the ever-growing population, the territorial data remained virtually unchanged.

Using the statistics in “The Kharkiv Calendar”, we can trace how the population and its composition of the city of Kharkiv and Kharkiv province has been growing over almost half a century, how various enterprises emerged due to which Kharkiv region transformed from agricultural -industrial to industrial- agricultural one, how different institutions and their addresses have changed, etc.

Characterizing scientific and popular science materials on the pages of “The Commemorative Book of Kharkiv Province” and “The Kharkiv Calendar”, in our opinion, it is worth giving their classification by topic separately because of different amount of such materials in these collections. Thus, in “The Commemorative Book...” such materials are divided into articles of natural, geological-geographical nature, on history and modernity, as well as those of agricultural orientation. The largest number of articles refers to the first criterion.

We find a significant variety of such materials in “The Kharkiv Calendar”. The authors have divided them into articles on history and modernity of Kharkiv and the province, astronomy and natural phenomena, articles of natural and geological nature, medical, agricultural articles, articles on trade. Some of them were published in several issues. In our study, we paid special attention to articles on history. For the most part, such materials were rather popular science, educational, and rarely covered discussion issues. In our opinion, the main purpose of the collection was to spread scientific knowledge, not to solve scientific problems. It is interesting, that other statistical publications of the 19th - early 20th centuries also contained materials on the history of the region or local folklore (Abil & Kuzembayuly, 2021).

In addition to articles, the publication also contained supplements, which can be divided into two types: current supplements (railway maps, wall calendars, etc.) and historical ones (historical plans and maps). The supplements played an important role in “The Kharkiv Calendar”: they provided integrity, added a wide variety of information, showing how the city and the province as a whole had been changing. We can also include historical chronicles in various historical publications, concerned not only Kharkiv province, but also the Russian Empire in general.

We find most of the historical publications on the pages of the supplement to “The Kharkiv Calendar” – “The Kharkiv Collection”, specially designed for this purpose and performed an educational function. Most of these materials are of general overview nature, but some of them raised discussion issues (for example, they drew attention to the lack of research, problems of preservation and use of archival materials, etc.). Among the authors of the articles were both professional historians (Dmytro Bagaliy and others) and amateurs (Mykola Lashchenkov and others). Due to this, the publications that are in the center of our attention reflected the level of historiography development to some extent (in particular, provincial). The main bulk of publications on historical topics belongs to representatives of the Faculty of History and Philology of Kharkiv University. Therefore, their level generally corresponded to the state of historical science existed at that time in Kharkiv Imperial University.

Some discourses in periodicals have often been the subject of research (Pinson, 2008). In the middle of the 19th century, historical science actively transformed to the position of positivist methodology in the Russian Empire. This meant, among other things, that the line between the historical and philological sciences, the historical and literary directions of creative activity, had widened. The connection between the latter was popular science literature, which did not require precise references to sources, often based on historical tradition (memoirs, legends, etc.), and in substantiating certain statements in interpretive schemes – on common sense. Such historical, artistically written works were to the liking of the reading public (Alkov, 2012).

Following the capital's publications, the provincial periodicals paid more and more attention to such literature, which, moreover, bore a strong imprint of teaching and moralism. It is clear that popular science articles were of different quality, depending on who the author of such texts was. For Kharkiv publications, as a rule, the authors were highly qualified specialists of Kharkiv University, which makes such articles scientific in the field and conclusions, as well as popular in the form of presentation.

This literature is largely part of the journalistic discourse of contemporary historical science in its provincial samples. Mykola Kostomarov (1817-1885) was the last outstanding native of Slobozhanshchyna and a student of Kharkiv University, whose work combined scientific and artistic directions. Next generations separated these activities. The writer Hryhoriy Danylevsky (1829-1890) was an outstanding figure in the historical and artistic activity of the region. Mykola Sumtsov, a literary critic, historian and ethnographer played an important role among the historians and publicists. It is noteworthy that the three of them were presented in one way or another on the pages of “The Kharkiv Collection”.

Historical and local lore research contributed to the rise of local patriotism, reflected in many facts: from changes in urban toponymy to the construction of a monument to Vasyl Karazin in the capital of Slobozhanshchyna Kharkiv, from changing the coat of arms to the provincial enthusiasm to hold the XII Archeological Congress (1902), etc.

4. Conclusion

The methodology of complex analysis of the statistical and information publication “The Kharkiv Calendar” allowed us, first of all, to consistently reveal its entire history – from the first steps in the form of “The Commemorative Book of Kharkiv Province” to the fundamental edition, which existed for almost half a century. The obtained results during the study of these sources, in our opinion, indicate that researchers of such publications should first determine the general picture of these existing collections for each region. Having identified some interesting points and directions, they may specify their research, that is, deal with narrower issues of certain topics reflected in them.

Using this technique, we have consistently determined that the statistical and information collection “The Kharkiv Calendar” had virtually no analogues in Kharkiv and the province. Like any similar publication in other provinces, it was valuable to other parts of the empire, containing unique local data. Firstly, because it gave the opportunity to compare information and determine the characteristics of certain provinces as a whole. In addition, Kharkiv Provincial Statistical Committee itself decided on the structure of the collection, which made such a publication different in each province not only in content but also in the form of information.

Structural peculiarities of “The Kharkiv Calendar” are in the fact that it combined both statistical data and the available information of that time: addresses of institutions, maps of railways, information about church holidays and much more. In addition, the publication also contained popular science materials in separate issues. This indicates that the publication has absorbed elements of the almanac, statistical publications, address books, that is, it can be included in a separate type of periodicals – statistical and information collections.

Therefore, when working with such collections, researchers should pay attention to the specifics of the publications, identify areas of work with them when applying the methodology of complex analysis. This includes separation of certain features and transformations of the structure (division into traditional and innovative headings, etc.); analysis of the ratio of general imperial and world information to local sources, as there may be dynamics of information in publications. Moreover, the researchers should also classify scientific and popular science materials (if there are any), highlight periods of the collections’ existence, pay attention to the specifics of collecting statistical information published on the pages of the collection because each province could have different information; identify regional specifics for each of the commemorative books or calendars.

Practical significance of the study is in the analysis of one of the most important sources on the history of Kharkiv in the second half of the nineteenth – early twentieth century. In our opinion, this will allow researchers to use it more effectively and increase the interest in studying similar publications in other regions.

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