

## THE QUESTION OF HISTORICAL-GEOGRAPHICAL (GENETIC) APPROACH TO SOCIAL AND GEOGRAPHICAL RESEARCH (brief review)

*The question of long-known, but in a certain period of time partly "forgotten" approach to social-geographical research, specifically, genetic, historical-geographical approach are considered. The article focuses on the need to strengthen it the present time the socio-geographical researches in terms of genetic and historical-geographical approach.*

*Keywords: historical-geographical approach, historical approach, historical-genetic approach, geographic approach, historical geography, history of geography, historicism in geography.*

**Вікторія Яворська. ДО ПИТАННЯ ПРО ІСТОРИКО-ГЕОГРАФІЧНИЙ (ГЕНЕТИЧНИЙ) ПІДХІД В СОЦІАЛЬНО-ГЕОГРАФІЧНИХ ДОСЛІДЖЕННЯХ (короткий огляд літератури).** Розглядаються питання застосування вже давно відомого, але в певний період частково «забутого» підходу в суспільно-географічних дослідженнях, а саме генетичного, історико-географічного підходу. В роботі акцентується увага на необхідності посилити саме в наш час суспільно-географічні дослідження з позицій генетичного та історико-географічного підходу.

*Ключові слова: Історико-географічний підхід, історичний підхід, історико-генетичний підхід, географічний підхід, історична географія, історія географії, історизм в географії.*

**Викторія Яворская. К ВОПРОСУ ОБ ИСТОРИКО-ГЕОГРАФИЧЕСКОМ (ГЕНЕТИЧЕСКОМ) ПОДХОДЕ В СОЦИАЛЬНО-ГЕОГРАФИЧЕСКИХ ИССЛЕДОВАНИЯХ (краткий обзор литературы).** Рассматриваются вопросы применения давно известного, но в определенный период времени частично «забытого» подхода в общественно-географических исследованиях, а именно генетического, историко-географического подхода. В статье акцентируется внимание на необходимости усиления именно в настоящее время общественно-географических исследований с позиций генетического и историко-географического подхода.

*Ключевые слова: историко-географический подход, исторический подход, историко-генетический подход, географический подход, историческая география, история географии историзм в географии.*

In the history of the evolution of geographical science in general and in the development of social geographic component of this system in particular have repeatedly observed periods of increasing and "calming down" of interest to the analysis of certain techniques, methods, approaches regarding these or other scientific problems. One of these problems, in our opinion, is the question of the application has long been known, but in a certain period partially "forget" approach to social and geographical studies, namely, genetic, historical-geographical approach.

In the middle of the twentieth century there was increased interest in this issue, then center of attention of researchers shifted to the area of analyzing of new approaches (systemic-structural, mathematical and other areas) and significantly decreased attention to the problems of application of historical-geographical approach. In the modern period since the independence of Ukraine in domestic analytics we can re-watch some updating historical and geographical perspective (published scientific work carried out and successfully defended dissertation research).

This is due primarily to the fact that after Ukraine's independence question arises a revision of outdated approaches, concepts, terms, categories last day of the development of geographical science, as sometimes excessive ideologizing are not always given the possibility of an objective approach to solving certain problems faced researcher. In addition there was a need to review our attitude to the past, to understand more objectively, and that will contribute to the formation of new perspectives on our future.

The necessity of applying the principles of historicism in the social-geographical studies, contradictory views of some authors on specific concepts and terminology of the said above issues, about own vision, the author of this paper tried to analyze in a short review of relevant literature (chronological framework - the second half of XX - beginning XXI century) .

This work does not pretend to a comprehensive and complete analysis of these issues. Its purpose - to draw attention in our time to the need to strengthen social- geographical position of the genetic study of historical-geographical approach.

The logic of any scientific research, as well as called problems, primarily involves interpretation, clarification of key terms, categories, definitions, concepts that are directly (or indirectly) related to the object under investigation [12. p.149]. Unfortunately, the first, superficial familiarity with the relevant literature shows that the strict terminological understanding of concepts, categories, terms with this problem does not exist or it is characterized by ambiguous interpretation of certain terms, concepts, sometimes leading to their mixing and complicates their application in the specific research.

Some authors believe that putting in the work of local history section, which contains superficial, narrative description of the history of a particular object, phenomenon, element in a particular area, or in the country, they have already paid tribute to historicism in geography. These researchers substitute essence of historical-geographical approach only by main method, in which is dominated statistical (empirical) object vision research, and does not contain characters in development, dynamics in the system perspective, the relationships with the surrounding components.

The historical-geographical research - is one of the most important approaches that allows "... reconstruct paintings of geography of past eras. During this reconstruction contains all system of geographical concepts, terms, but

they use additionally time coordinate" (Pokshyshevskyy, 1978).

In the 80s years of the last century Russian economic geographer N. Kaledin expressed concern about the fact that in those days still observed certain lag in the use of such important approach in the social-geographical studies as a historical-geographical analysis (historicism). He observed: "the developing of a system methodology has revealed the real possibility of historicism in geography, which is manifested in its interaction with systemic-structural approach .... Knowledge of the laws of the genesis of the system, its development has become the basis for reproduction in the genetic analysis of the whole system, its qualitative states that are consistently obtained with each one of the original to the present and likely into the future"[15. p.64].

But this ambiguous situation is that the vast majority of economic geographers do not deny, however, support the need for widespread use of historical-geographical approach to research and analysis. But in reality, in practice you can find these facts, that some authors even understand on different way not only the materiality of historicism in geography, do not apply methodological (and teaching) principles of this approach, but even suggest mixing in such factors as historical geography, history of geography, historical-geographical approach. Mostly it occurs in country-specific studies publications in which certain historical sections (often very bright and content) are taught in a statistical, descriptive, chronological aspects, even without any "hint" to analyze the causes of formation and development of facilities, events or processes under the influence of various internal and external natural or man-made factors.

The most heated debate on this problem opened among scientists in the 50-60-s years of twentieth century. One reason for this concern is likely to consider the leadership of All-Union Geographical Society in the person of Academician I.Gerasimov (in those days - Vice President of Society), which is at the Second Congress of the Society (1955 year) categorically stated: "In the modern period is required primarily historical approach in every way to strengthen the study of geographic phenomena. This approach should be the basis of scientific explanation for a large variety of natural and economic conditions of a territory "[8. p. 81]. After this was published a number of works whose authors directed critical remarks about those scientists who do not always comply with these guidelines. Under the "fire of criticism" gets even prof. Y.Saushkin (generally-recognized in those time as a "generator" of new ideas and approaches in economic geography), which as always urged to use "descriptive approach" in their studies.

In the most conservative form of criticisms of using of historicism in the social-geographical studies, we find in the work of M. Zhyrmunskoho "The Principle of historicism in the economic geography" (1962). It is criticized the authors who mix concepts and terminology in these problems such as "historicism in geography" and "historical geography", "history of geography" and "genetic approach", etc..

Apart from the characteristic of the time terminology ("bourgeois - Marxist geography", "capitalist - socialist location", "vulgarism in geography") and other ideological layers, we can see that such criticisms were and some positive value. They contributed to the deepening understanding of the need to use historical-geographical approaches in social-geographical research, targeting of scientists at the interconnected vision and analysis of territorial (spatial) and temporal components in the objects and phenomena that are the subject of study. The same M.Zhermunskeyy repeatedly emphasizes in his work that "... Historicism in geography requires not only answer to the questions when there was a phenomenon that is studied, but also why, under what specific conditions it arose" [14. p.108]. He tries to organize all discussion terms and concepts of this issue, formed a definition of certain terms and concepts that had certainly some scientific significance in deepening further research.

Let us first of all to concentrate on terms of terminology such as "historical geography", "historicism in geography", "history of geography", "historical-geographical approach," "genetic approach". A number of authors in the context of research on this issue believe (and we have to agree with this) that in this situation there was (and unfortunately sometimes exists in our time) some confusion about the interpretation of these terms and concepts in research.

First of all we must note that the mixing of the concepts of "historical geography" and "history of geography" at the level of their content, and in terms of problems facing these areas of research in geographical science, often led to the emergence of works whose authors sometimes do not experience significant differences between the concepts of "historical geography" and "history of geography." This has been repeatedly underlined in the relevant work of national and foreign researchers (V.Drobyshev, I.Kovalchenko, A.Muravyov, M. Zhyrmunskyy, L.Voropay, V.Yatsunskiy, R.Kabo, N.Mukyatanov and others).

Here are some definitions of terms and concepts that are found in the scientific literature. And that ambiguously are perceived by some researchers. Already referred by us M.Zhyrmunskyy defines historical geography as a science, "... the subject of which is geography economy in the last stages of historical development" [14. p. 94-95]. Native scholar L.Voropay believes that historical geography - a "science of connection between geographic and historical sciences, .... This is a complex system of integrating geographic science, which is formed in the area of mutual interest of sciences between natural-geographical and socio-geographical cycles in the contact zone of geographic and historical sciences, ... science of multiple submission [7. p.134-135], N.Mukyatanov [19. p. 24] use a somewhat different interpretation of historical geography. He believes that "the historical geography is a science that explores the history of ideas about the subject of geography." It consists of two parts - the historical geography (paleogeography) is a subsystem of natural geography, and social-historical geography - to the social geography of the subsystem [19. p. 211].

Concerning the concept of "historicism in geography", we can agree with the opinion of M.Zhyrmunskoho "historicism in geography - it is the method of research. It requires not only answer to question when appeared this or that phenomenon, which we investigate, but also why and in which specific conditions and in what specific form it then emerged" [14. p.108].

In domestic and foreign analytics, we find many statements about the need to use historical-geographical approach to social-geographical research.

The need for the study of social-geographical features, processes and phenomena from the standpoint of historical-geographical (genetic) approach pays particular attention to famous native economic geographer Prof. A.Golikov. He stresses that "... without an analysis of the historical past it is difficult and sometimes impossible to understand the contemporary situation, to make economic-geographic prognosis for the future ... The historical-geographical approach helps to identify the causes and factors that led to the emergence of a particular object of economic-geographical character, study stages of its development to the present state" [9. pp.45-46].

Historical-geographical approach (analysis) provides a real opportunity to deepen our understanding in the process of socio-geographical study of the territorial division of labor in a particular region (or in the country). This drew the attention on the 70-s years of the last century, Russian scientists M.Agafonov and S.Lavrov. They pointed out: "... at each particular stage of historical territorial division of labor is a historical form of the spatial manifestations of social division of labor. Thus, the territorial division of labor under the influence of more and more internal links (as a result of new elements of production), and retains some ties that have developed over the previous historical stages." [1. p.27].

Y.Saushkin concerning analysis of spatial and temporal relationships in the socio-geographic research emphasizes that the territoriality of objects - the main feature in these studies. From this perspective, territoriality should be considered in the time dimension in research requires the use of historical method. "Materiality of geographic research is in the transitions of the spatial aspect to the time and, conversely, from historical analysis to the territorial" [24. p.444]. "... Spatial-temporal relationship should always be considered in the unity and integrity" [24. p. 447].

Historical and geographical approach is appropriate to use when analyzing problems associated with the process of formation and transformation of the political world map (or some regions), the study of certain categories, concepts in the social-geographical science (eg. Territorial division of labor, geographic thinking, economical-geographical position, etc.).

Prof. O.Topchiev emphasizes "... social geography uses the methodology of historical approach and examines the objects of their research in dynamics, in the historical evolution and development" [26. p.183].

The need for wide application in the socio-geographical study of time coordinate closely with the spatial coordinate we find in the European analytics. Thus, D.Harvey analyzing types of analysis and explanation in geography in his monograph, "The scientific explanation in geography" (1974) devotes a chapter to this issue. He speaks thus: "All type of explanation in geography gives us one measure - measure of the time, using of which provides the opportunity to understand as the nature of accommodation as penetrate deeply into the nature of time processes." [28. p.78].

In view of the author of this work such terminological concepts as "historicism in geography", "historical-geographical approach" in the semantic sense are synonymous. As for the notion of "genesis" (origin, formation), "genetic approach" we can assume that they are closely related to each other; historical-geographical research (approach) is a some kind of "continuation" of the genetic approach in the research of objects, phenomena in a wider temporal and spatial framework.

This combination of two approaches also was pointed out by O. Smirnov: "... genetic approach in the early stages of its using had mainly descriptive and historical character, but in the next period follow-up to the level of genetic generalizations. But he only answered to the questions how evaluate geography of certain phenomena and not to the question why it evolved this way under influence of internal and external factors of nature." [25.p.41].

In the future, O.Smirnov stressed that the research of problem here lies not only in order to detect a specific sequence of genetic forms (phenomena, objects, processes), and above all the need to see and to explain patterns of occurrence and localization of these forms in a particular area, under the influence of a set of internal and external factors.

About the term "history of geography" we can argue that in the relevant scientific works has not been observed controversial thoughts, definitions, comments regarding this scientific discipline. Almost all the authors believe that the history of geography - a general geographical discipline that examines the history (evolution) of geographical knowledge, geographical views, ideas, geographical representations.

Schematic model of the relationship between terms, categories, concepts that related to the investigated study author attempted to present in Figure 1.

In the framework of limited size of this article we present only some examples of "classical" analysis of native and foreign scientists, from the point where historical-geographical vision discusses the genesis, historical-geographical development of specific cities, areas (regions) or a country in whole.

Famous Russian scholar urbanist G.Lappo in his work "Story about cities" [17. pp. 44-45] analyzing the pattern of occurrence and the vicissitudes of cities during the Russian Empire in the XIX-th century and the Soviet era in the twentieth century gives many examples of the emergence, development (or decline) of cities. Thus, the author vividly, from the standpoint of historical-geographical approach analyzed why, under which specific factors Ochakiv (Nikolaev region), which predict to becoming the main Black Sea ports of Russia Empire, eventually decline in history, behind the other port cities - Nikolaev, Kherson and Odessa, which appeared much later than Ochakov.

The phenomenon of Odessa and its rapid growth in the first half of the nineteenth century devotes the numerous historical, social-geographic literature and even fiction. But perhaps the most thorough in our view, the analysis of this "miracle" we find in the works of Prof. O.Topchiev, he proved that in the historical past, natural, socio-economic and

strategic factors, geopolitical factors and their interaction have created such conditions that Odessa must be the "capital" of the Ukrainian Black Sea [20, 21].

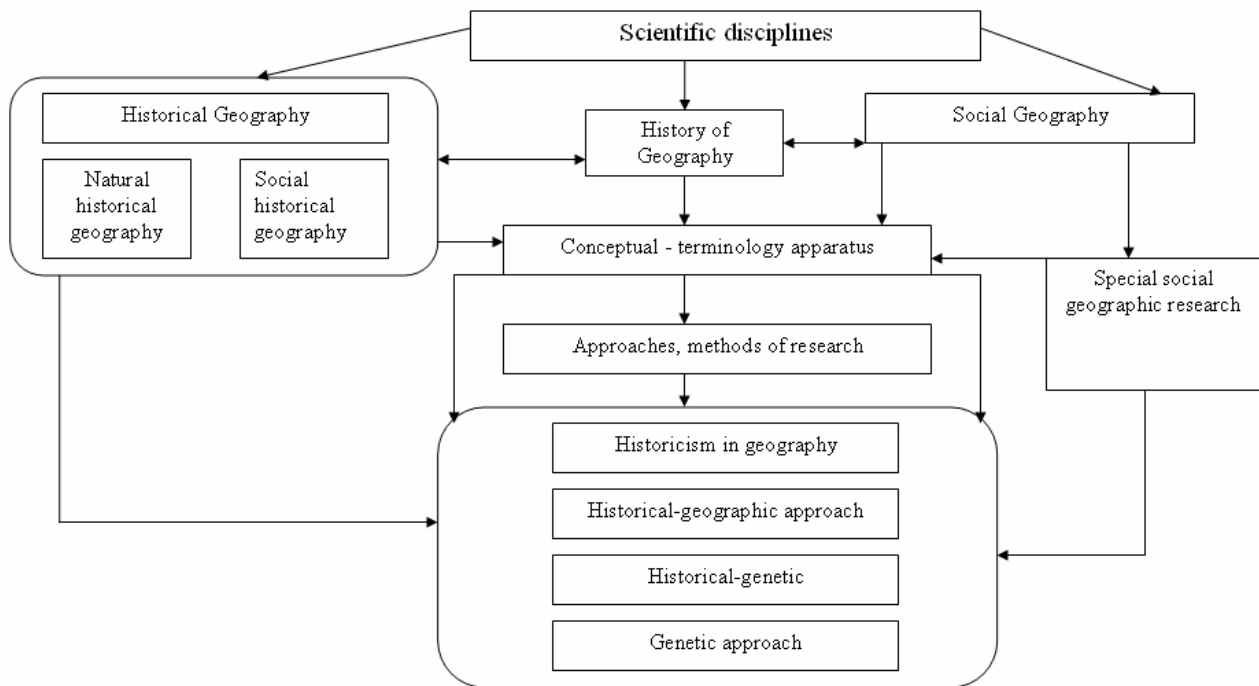


Fig.1. Schematic relationship of specified terms and concepts

An example of effective historical and geographical analysis of individual country can be a work of a famous scientist S.Nymmik. It showed how the historical past (XIX-XX century) under the influence of EGP characteristics, environmental conditions, close and distant relationships (European, Russian markets, integration ties with the Soviet reality) consisted and developed (transformed) branch territorial structure of the economy of Estonia [18. pp.255-293].

As an example of historic-geographical analysis of political and economic map of the world as a whole, its development and changes under the influence of various factors and a set of factors is the work of I.Witer "Historic-geographical introduction to economic geography of the world" (1963), which by the way, emphasizes that "historical approach to geographic phenomena teaches to consider them in relation to specific historical conditions of this era and thus help them correctly assess [6. p.4].

Above was mentioned that in the last period in the native social-geographic analytics significantly updated problematic of historical-geographical research. Well-known Ukrainian scientist V.Dzhaman in his monograph "The regional settlement system: demographic aspects" highlights that "the current settlement, especially the territorial structure of the region, forms and relationships of components of production areas can be understood only through historical approach to it ... To better understand the patterns of modern settlements network, you need to know the genesis (background: a foundation and primary function) and the entire process of development of settlements and each locality in particular." [11. p.23].

O.Borisova in her dissertation work developed the method of complex historical-geographical study of rural network in the region settling of Podillya and that is the main and important - she offered her own definition of "historical-geographical research." In the history of the national socio-geographical analysis - this is probably the first attempt to formulate this concept. In the context of our study we give a full definition proposed by this author (in the version that appears in the abstracts of dissertations: "Historical-geographical research - is a study based on an interdisciplinary approach to identify features of formation and development facilities, processes and phenomena within individual areas under the influence of certain factors in different historical periods (within the studied chronology)" [5. p.17].

As we see in this definition there are two immanent indications on the concept of "historical-geographical research" - territorial (spatial) and time coordinates, which should be considered as definitely positive. But in our opinion, is not evident methodological feature that should be a necessary component in the conceptual and terminological structures. It is said about the term "complexity". Although in the above definition of "historical-geographical research" is such a component as "interdisciplinary approach", it, in our opinion, fully not compensates the lack of methodological features of "complexity." We believe that the inclusion concept of "complexity" in the context of the concept of "historical-geographical research" was justified, reasonable and scientifically correct. At the same time, we can assume that this issue can be attributed to the category of debatable issues.

Noteworthy in our opinion an interesting approach to resolving misunderstandings between supporters and opponents in the debate "historical-geographical" and "historical-genetic" problems we find in the monograph V.Krul

"Retrospective settlement geography of the Western Ukraine" (2004). This scientist suggested "... delineate geographical- historical approach to the study of historical geography by introducing into scientific circulation name "retrospective geography" and offer it for geographers, but for historians to leave their familiar historical geography. The guiding principle of her research as opposed to actual historical geography is a diachronic approach" [16. p.65].

Thus, in our time there is searching for the best methodological (theoretical) understanding of various approaches in a rich arsenal of scientific methods of geographical science.

On the basis of generalizations relevant achievements (developments) of native and foreign scientists and own vision of the essence of this issue, we can draw the following conclusions concerning the understanding of these terms and concepts:

- Historical geography as social sciences studies the specific geography of the past and its changes in different historical periods;
- History of geography - examines the development (evolution) of geography, geographical knowledge, geographical ideas and concepts;
- Historicism in geography - a method of historical-geographical research of objects, phenomena and processes;
- Historical-geographical approach - a complex study of social-geographical features, processes and phenomena from the standpoint of their spatial and dynamic (time) relationships in their unity and integrity on the certain historical stages of their development.

So historicism in geography and historical-geographical approach in context of our understanding of this issue should be considered as synonymous concepts.

Historical-geographical approach is an analysis of changes in the geospatial position and distribution of certain geographical features and their combinations -complexes, studying the dynamics of socio-economic components of the earth's shell; diachronic analysis of comparing states and situations. It consider natural change of the geographical processes.

The main aim is studying of trends, establishing their areas of directions, prediction.

The main methodological approach - the establishment of social-geographical processes of different kinds, representing development (changes) of individual components and geocomplex.

Genetic approach (genesis - origin) - includes analysis of causes and time of certain objects and phenomena that change their function and structure under the influence of a set of internal and external factors, in the process of their development. The genetic approach and the historical-geographical approach are inseparable from each other, they are interrelated, complementary and should be used in connection with each other depending on specific situations, goals and objectives of the study.

Schematic relationship of specified terms and concepts are presented in Figure 2.

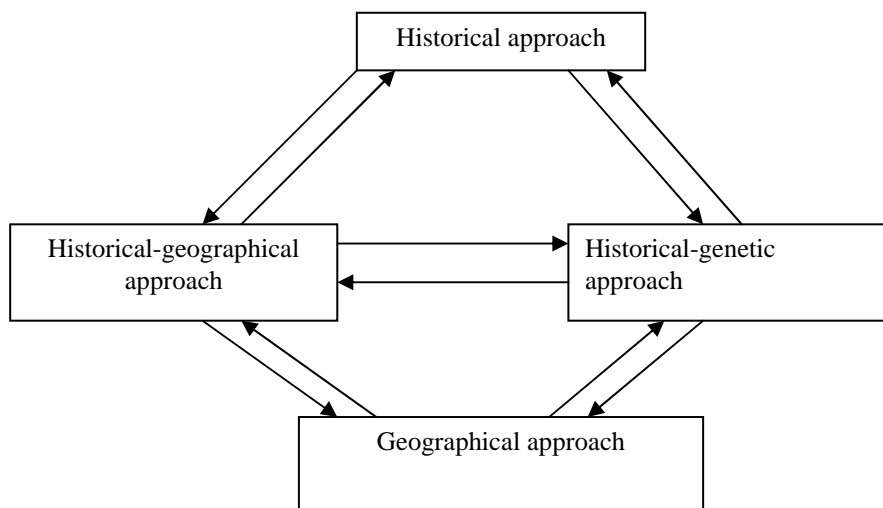


Figure 2. Correlation of specified terms and concepts

Historical-genetic approach is applied to geographic features, processes, systems for which you can identify key genetic features - from origin, through the maximum development to the attenuation or extinction. Target direction is an analysis of those components of the landscape for which are established genetic trait. The content includes the analysis of stages development, cycles, local systems and structures, networks and more. Genetic representation of change is development.

We should pay attention in the context of this study is interesting to the approach of the study of specific region, which was suggested by Russian scientist I. Poberezhnykov [22].

He believes that in any economic region (common in the social-geographical sense of the term) is formed structure (sectoral territorial) of manufacture and the whole area of the population's life activity is not under the influence of the "Moscow-Petersburg guidelines of Concept and Strategies" ( terminology of the author of this

approach), and especially under the influence of those factors and elements of natural and man-made, that fill the territory of the region and its natural, ethnic, geopolitical, civilizational nearest environment.

This approach, according to the author, allows to explore and understand not only the overall logic of the processes of development, but also influence (impact) on them from scene of action, to establish the relationship and interdependence between the pan-national dynamics of development and dynamics of regional structure; to allow to interpret large-scale historical processes by aggregating local events and more. This approach author is called as the regional and all research of region origin is conducted through the prism of historical-genetic and historical-geographical view of this issue.

In summary his basic methodological principles can be summarized as follows:

- Occurrence, formation of entire mechanisms and structures of reproduction (sectoral, regional, social, and others) formed in the process of regional development at various levels of complexity, which are localized in the specific area, fixed here and "use" existing elements of natural and human environment in its development;

- Regional development author defines as the dynamics of regional structure, it has been resulted in the distribution (and redistribution) of the regional roles of parts of the region in economic, social-cultural, geopolitical and other areas;

- The formation of the region is the historical process, the region itself is the product of this process. As a result of evolution it changing, transforming, complicated territorial, sectoral, social structure of the region. In the research of region formation's area the most fruitful (effective) tool for its study is historical-genetic approach.

- The study of any region requires repeated identification of its historical projections. This procedure is performed on base of one characteristic (factor), or their whole system. Preference is given to multidimensional using of features to provide the definition of quality originality and vector of development. It is proposed to use about 15 features, which the author united in 4 groups:

- Natural and geographical conditions;

- Socio-economic parameters;

- Ethno-demographic, ethno-linguistic parameters;

- Administrative and political parameters.

- The study of processes of region formation from position of historical-genetic and historical-geographical approach should be comprehensive analyzed such problems as the colonization of the region, its characteristics, socio-economic development; issues of socio-cultural dynamics, modernization processes, diffusion of new technologies. There are described the materiality of these problems and proposed the methodology and technique of their perception and analysis;

- The most important parameter (measurement) of regional development can be a degree of regional identity of the region. When the role of the region in the territorial division of labor is risen, and complicated its sectoral and regional structure it shows that the degree of identity increases. If, by contrast, we observe a simplification of its territorial and sectoral structure, its role in the territorial division of labor on a national scale decrease - we have in this case the indication of reducing the degree of identity. When this parameter reaches zero it means that this territory absorbed by the neighboring region (integrated in its composition), or converted into homogeneous geopolitical space.

- The final part of this study (in the sense of the author of this methodology) should be construction of model of social-geographical image of the region. Simulation of the image region acts as a summary, synthesis of all the regional study. It includes administrative-territorial image of the area and portrait of his historical-geographical development and geocultural images and more.

Modelling of geographic image associated with the development and application of specific methods and approaches (methods of allocation of core region, its branching, zoning and so on). All of them are largely determined by objectives, targets of research. As characters of the image to the region of Yamalo-Nenets national district (the object of research I.Poberezhnykova) are: Obdoriya, manhazeya, Arctic Ocean, North Sea Route, the traditional culture of reindeer breeders, tundra and others;

Notes the author of this work on the main methodological and methodical provisions of this approach are:

- Number of positions are not fundamentally new in social-geographical researches. But it should not be considered as a significant disadvantage of this approach. Comparison, the reference to already known concepts, terminology, etc. depending on the goals and objectives of research is justified. This applies above all to such methods in studies as univariate and multivariate approaches which is widely known in social-geographical studies;

- Some positions are controversial;

- The concept of "historical-genetic" and "historical-geographical" approach in understanding of that researcher acting as synonyms, although here we can see some differences: in the first case, accent, emphasis on the genetic component and the other - the geographical (spatial) component;

- Author, in our opinion, some exaggerates the significance of the building of model of social-geographical image of the region. It certainly has some information and cognitive value, but like any model "it simplifies the materiality of the object, it is always poorer than the reality and not disclose to the end of the whole complexity" [23. p.345].

Despite these controversial comment, the proposed by I.Poberezhnykov approach is deserves, in our view, a positive assessment and its basic methodological and methodical components can be used in a particular historical-geographical research, depending on its goals and objectives.

### Conclusions:

1. Historicism, historical-geographical approach to geographical research requires not only answer to the question when there was a corresponding phenomenon, object, some system formation, but also to the question why and in what specific circumstances and in what specific form they arise in the past. In other words, this approach requires from the researcher:

- Analytically reveal the historical-geographical conditioning of a particular object in a certain place (genesis);
- What are the main stages in its development it (object) was under the influence of internal and external factors (natural, economic, social, ethnic, political, etc.);
- From the standpoint of analytical result of this development to assess its current specifications, options, its role and place in the territorial division of labor in the structure of the economy and more.

2. We think that interest to such techniques as genetic approaches, historical geography will continue to grow, expand, its methodological and methodical basis will be improved and it will find its rightful place in the rich arsenal of methods and approaches in social-geographical science.

3. In the last period (beginning of the XXI century) in domestic and foreign social-geographic analytics observed recovery (updating) the historical-geographical researches as in their semantic aspect as in a broader and deeper understanding of methodological and methodical principles of their application. This approach is characterized by great scientific potential and its application will expand the range of research, will contribute to a more objective view of the old problems, and therefore an acceptable solution as in research aspects as in constructive and practical aspects.

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