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Demographic Determinants of Employment Transformation in Lviv Region: Regional Dimension and Business Assessments

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ABSTRACT

The study aims to assess demographic transformations in the labor market of Lviv Oblast within the context of local business operations amidst the prolonged war. The paper examines in detail the macroeconomic resilience phenomenon of the Carpathian region. It compares national and regional discourses that position Lviv Oblast as a key socio-economic, investment, logistical, and humanitarian hub of the country due to its relative remoteness from the frontline, mass relocation of enterprises, development of industrial parks, and integration of significant flows of internally displaced persons. However, contrary to the positive external perception of the region's state, this study structures and details hidden deep crisis processes within the local business environment based on an empirical survey of 114 domestic enterprises. It is established that maintaining the viability and stable number of economic entities is accompanied by substantial difficulties caused by severe demographic challenges, including structural shifts in the labor market, external migration, and security (mobilization) processes. The key scientific and practical focus of the work is centered on substantiating the large-scale financial and resource gap between different categories of businesses, which shapes a deep asymmetry and inequality in the market. It is proven that large enterprises, as well as a segment of stable medium-sized companies, possess a colossal competitive advantage over micro- and small businesses. This advantage is directly driven by financial capabilities and manifests itself in the capacity to attract scarce personnel, retain and promptly retrain existing specialists, as well as systematically optimize and automate production and management processes. Consequently, the study substantiates the logical necessity of scaling such monitoring surveys to the regional level with the direct participation of the Lviv Regional Military Administration. Based on expanded criteria, this will allow for an objective assessment of the actual quality and effectiveness of existing grant and compensation programs.

KEYWORDS

Lviv oblast, personnel deficit, demographic determinants, small and large enterprises.



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СОЦІАЛЬНИЙ РОЗВИТОК: економіко-правові проблеми

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Демографічні детермінанти трансформації зайнятості у Львівській області: регіональний вимір та оцінки бізнесу

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СТАТТЯ

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Дослідження спрямоване на оцінку демографічних трансформацій на ринку праці Львівської області у контексті функціонування місцевого бізнесу в умовах тривалої війни. У роботі детально розглянуто феномен макроекономічної стійкості Карпатського регіону. Співставлено загальнонаціональний та регіональний дискурси, у межах яких Львівщина позиціонується як ключовий соціально-економічний, інвестиційний, логістичний та гуманітарний хаб країни завдяки відносній віддаленості від лінії фронту, масовій релокації бізнесу, розбудові індустріальних парків та інтеграції значних потоків внутрішньо переміщених осіб. Проте, на противагу позитивному зовнішньому сприйняттю стану регіону, у дослідженні на основі емпіричного обстеження 114 місцевих підприємств структуровано й деталізовано приховані глибокі кризові процеси всередині локального бізнес-середовища. Встановлено, що утримання життєздатності та стабільної чисельності суб'єктів господарювання супроводжується значними труднощами, зумовленими жорсткими демографічними викликами – структурними змінами ринку праці, зовнішньою міграцією та безпековими (мобілізаційними) процесами. Доведено, що великі підприємства, а також частина стабільних середніх компаній, мають колосальну конкурентну перевагу над мікро- та малим бізнесом. Ця перевага прямо обумовлена фінансовими можливостями і проявляється у здатності залучати дефіцитні кадри, утримувати й оперативно перенавчати наявних спеціалістів, а також системно оптимізувати й автоматизувати виробничі та управлінські процеси. Обґрунтовано необхідність масштабування подібних моніторингових обстежень до загальнообласного рівня за безпосередньої участі Львівської обласної військової адміністрації, що дозволить на основі розширених критеріїв об'єктивно оцінити реальну якість і результативність наявних грантових та компенсаційних програм, а також розробити диференційовані, гнучкі інструменти підтримки та захисту кадрового ядра для сегменту малого й мікропідприємництва.



КЛЮЧОВІ СЛОВА

Львівська область, кадровий дефіцит, демографічні детермінанти, малі та великі підприємства.

1. Introduction

In the conditions of prolonged martial law and a full-scale geopolitical crisis in Ukraine, a radical spatial transformation of the national economy took place. Due to the relative security distance from the front line, the Carpathian region and, in particular, the Lviv region became one of the key recipients of relocated businesses and internally displaced persons. However, this very status creates a unique burden on regional infrastructure and human resources. The main contradiction is that the large-scale inflow of capital and new business entities has intensified internal competition for scarce resources, primarily for human potential, which has significantly intensified under the influence of mobilization processes and external migration. In such conditions, there is a need to assess the existing structural imbalances and personnel barriers in the labor market, as well as the formation of differentiated business support mechanisms, which determines the feasibility of this study.

2. Literature Review

The issues of transformation of the business environment, spatial redistribution of productive forces and adaptation of the regional economy of Ukraine to the conditions of a full-scale war are in the focus of attention of many domestic scientists. Fundamental applied and theoretical research on ensuring the resilience and stability of regions in conditions of instability is reflected in the works of leading specialists of the State Institution "Institute of Regional Studies named after M.I. Dolishnyi NAS of Ukraine", in particular Vasylytsiv T.G. [1], Bil M.M., Mul'skaya O.P. [2], Levytska O.O., Baranyak I.E. Their scientific works deeply analyze the risks of loss of human capital, the features of internal and external population displacement, and also substantiate the strategic priorities of state policy regarding the preservation of labor potential as the basis of economic security of regions.

3. Problem Statement

Despite the availability of thorough works by scholars in the field of migration, the labor market, and personnel shortage, researchers have not paid attention to the issue of severe intrasystemic inequality in the labor market through the prism of the financial capabilities of enterprises of various scales. There are practically no studies that would assess how exactly big capital (having preferences in industrial parks) and small business compete for limited human potential within the same region under conditions of a unique load on infrastructure. Most Ukrainian researchers use generally accepted economic and statistical indicators, which are quite rigidly tied to the official reporting of the State Statistics Service, however, they often differ from the information needs of key subjects of regional development (local governments, investors, business communities, international donor organizations). This methodological limitation leads to the fact that flexible market indicators, such as real investment risks, shadow employment, or in general, the transformation of economic behavior of business entities, which integrates market changes, innovation and technological shifts and strategies for adapting enterprises to regional or global aspects, and now to the shocks of the war period, remain outside the attention of scientists. As a result, academic works focus on recording past statistical facts, while management practice requires forecasting scenarios and assessing the operational capacity of specific territories.

The article aims to assess the real state, adaptability and destructive trends within the business environment of the Lviv region under martial law, as well as to identify the financial, resource and personnel gap between enterprises of different scales based on the results of the conducted empirical study.

4. Methods and Materials

The survey was conducted in January–April 2026 using the strategic (quota) sampling method. The output was 114 questionnaires with the following distribution: 17 questionnaires from representatives of large businesses, 38 questionnaires from representatives of medium-sized businesses, and 59 questionnaires from small enterprises. The study reflects the subjective assessments

of enterprise managers regarding their understanding of the current situation regarding the workload of their enterprises, the expected development of enterprises, the model of retaining existing personnel and attracting new ones, the perception of the situation on the labor market based on their own difficulties or, conversely, successes in attracting quality employees, and in general answering diverse questions regarding their behavioral model on the labor market and expectations in the near future. Given the high density of the tools and the complex structure of the response options, the survey results should be interpreted as identifying sustainable trends and strategic trends in business behavior.

5. Results and Discussion

At the macroeconomic level, the Carpathian region and in particular the Lviv region are positioned in modern scientific and analytical discourses as a key socio-economic and humanitarian hub of Ukraine:

- powerful business relocation flows are directed here. For example, in 2022–2023, 238 companies were relocated to the Lviv region, which allowed saving 5 thousand jobs [3]. At the same time, relocated enterprises received a number of preferences within the framework of the small and medium-sized business support program, including significant financial assistance (from 100 thousand to 800 thousand UAH for each, depending on needs) and support in resolving bureaucratic issues. In the future, the Lviv region remains in the top five most popular regions for business relocation;

- Lviv region is among the leaders in launching new enterprises – 2504 according to the results of 2025 (and second place after the capital – 10401). In total, 28,913 new companies were registered in Ukraine this year, and 2,871 ceased operations;

- in terms of the number of newly created individual entrepreneurs, Lviv region took third place in the first quarter of 2025, and most importantly, against the background of the nationwide negative trend of “predominance of closures over openings of individual entrepreneurs during this period” – it maintained a positive balance (together with Ivano-Frankivsk, Volyn, Rivne and Kyiv regions) [4]. Of the interesting facts – according to YouControlMarket [5] in 2024, 6 out of 10 individual entrepreneurs were opened by women;

- in the Ukrainian and international business environment, Lviv is today firmly associated with the status of “main logistics center”. Over the past 4 years, four large-scale industrial and logistics projects have been implemented here (PORT Logistics Center – 77,000 sq.m., Sparrow Park Lviv – 21,000 sq.m., M10 Lviv Industrial Park – 14,400 sq.m., ProTec Zymna Voda and PERETYN) and several small ones. Thanks to the development of warehouse infrastructure and logistics chains, Lviv region today provides about 35–40% of domestic exports to EU countries;

- housing construction in Lviv region maintains absolute leadership in Ukraine in terms of the number of new projects (166 new residential complexes compared to 84 in Kyiv region) and ranks second in the country in terms of housing commissioning (1.67 million sq.m.), second only to Kyiv region (1.99 million sq.m.);

- since the beginning of the war, the Lviv region has received hundreds of thousands of IDPs (according to the Lviv OVA, in the first months of 2022, more than 600 thousand people were simultaneously in the region). Some of them later went abroad, and many returned home due to the de-occupation of the northern regions of Ukraine. Today, about 200 thousand [6] internally displaced persons are officially registered in the region. This is every 11th resident of the Lviv region. The structure of registered IDPs in the region is as follows: 23.3% are children under 18 years old, another 20% are people over 60 years old, about 4% are people with disabilities; by gender distribution – 63% of all IDPs are women.

At the same time, the macroeconomic stability declared by official statistics has a downside, which is clearly visible at the micro level. Our empirical study of 114 enterprises in the Lviv region [2; 7] conducted in early 2026 revealed deep destructive trends within the business environment of the region, and also demonstrated clear differences in the strategies of behavior of large, medium and small businesses in the region. We will reveal a detailed analysis of individual points below:

First, it is worth noting that while maintaining the viability of enterprises in the current war period, management records significant problems with the formation of the necessary number of staff (see Table 1).

Table 1. Change in the total number of employees at enterprises in the Lviv region during 2022–2025, in %

	To which group does your company belong in terms of the number of employees?			Total (n=114)
	Small businesses (up to 50 people)	Medium-sized enterprises (50–250 people)	Large enterprises (over 250 people)	
reduction of more than 40%	5.5%	0	4.5%	3.5%
reduction of 30–40%	10.9%	2.7%	4.5%	7.0%
reduction of 20–30%	1.8%	13.5%	0	5.3%
reduction of 10–20%	23.6%	18.9%	9.1%	19.3%
reduction up to 10%	3.6%	5.4%	9.1%	5.3%
no change, ±5%	32.7%	21.6%	40.9%	30.7%
increase up to 10%	9.1%	16.2%	18.2%	13.2%
increase of 10–20%	7.3%	13.5%	9.1%	9.6%
increase of 20–30%	5.5%	8.1%	0	5.3%
increase of more than 40%	0	0	4.5%	0.9%
Total	100.0%	100.0%	100.0%	100.0%

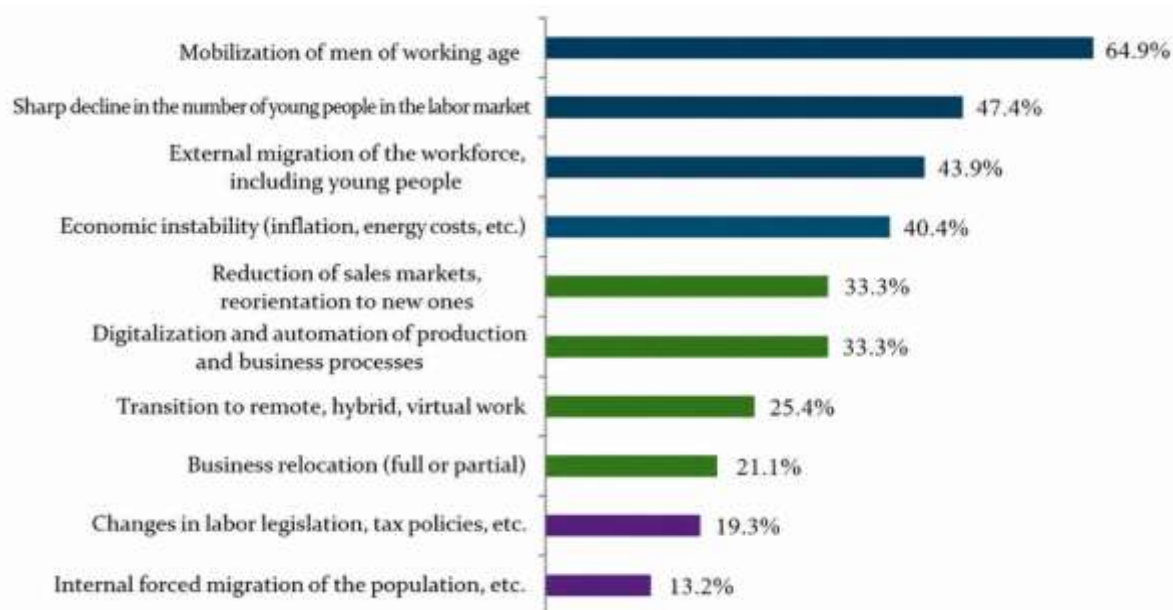
Source: Formed by the authors based on [5].

From the data in Table 1, it is clear that the largest group, fashion (30.7%), kept the number of employees unchanged (±5%), and this indicator is the highest among large companies (40.9%). In general, the trend towards staff reduction was stronger than the trend towards expansion: 40.4% of enterprises reported a general decrease in the number of employees, while only 29% recorded an increase. Small enterprises were the most vulnerable to significant staff losses, where 45.4% of respondents reduced their staff by 10% or more. At the same time, the only group where staff expansion exceeded reductions were large enterprises: reductions – 27.2% versus growth – 31.8%.

Secondly, local businesses tend to interpret the personnel crisis mainly as a consequence of the contraction of supply on the labor market, where they focus exclusively on global demographic and security challenges that are beyond the direct influence of a particular enterprise (Fig. 1):

- mobilization of working-age men is the absolute leader among the answers – it was mentioned by 64.9% of surveyed managers. This indicates that the withdrawal of the active part of the workforce into the ranks of the Armed Forces of Ukraine is perceived by businesses as the main shock to operational activities;

- lack of youth (47.4%) and their migration (43.9%) create a “demographic gap”. This means that the market is losing not only current personnel, but also future potential for recovery.

**Figure 1. What factors have had the greatest impact on changes in supply and demand in the regional labor market in your industry, %**

Source: Built by the authors based on [5].

The discussion on such answers can be extremely broad, from support for “full awareness of the business regarding the state of the labor market” to an absolute denial of this thesis in the following format – “instead of modernizing processes and training existing/new personnel, management mainly states the impossibility of closing vacancies according to old patterns”.

However, the available research still provides for the reflection of the tools for enterprises to adapt to changes in the labor market, in particular, the shortage of personnel. Figures 2 and 3 show that in conditions of martial law, preserving personnel potential and continuity of operational processes forces business entities to balance between financial incentives, internal optimization and attracting new socio-demographic groups of employees. The main trends are as follows:

- empirical data indicate that the personnel strategy of microbusinesses has a pronounced “manual” anti-crisis management character (Figure 2). Microenterprises do not invest in automation (only 12%) or inclusivity (6%), because all resources are focused on extensive intensification of the work of the existing staff (hence the maximum indicator of 76% – for the redistribution of duties and the accompanying 53% – an increase in wages). The pragmatics of operational survival blocks the cooperation of microenterprises with specialized educational institutions (0%), since the business needs to immediately close vacancies and does not have the resources for long-term staff development. An alternative adaptation solution in this context is the capitalization of the potential of the “silver economy” (47% for hiring workers in the 60+ category). This segment of the labor market appeals to microbusiness due to its specific immunity to mobilization, the presence of former professional competencies and high loyalty to non-standard work modes.

- small business entities demonstrate a qualitatively different specificity of personnel behavior (Figure 2) compared to the micro segment. The key institutional factor that transforms their strategies is access to mechanisms for reserving military personnel (34% of responses). The presence of this tool for stabilizing the staff directly correlates with other parameters of companies’ life activities. In particular, small businesses record the lowest dependence on financial motivation tools (37%) and more moderate labor intensification in the form of internal redistribution of job responsibilities (50%). At the same time, they actively attract young people without experience (26%) – apparently, betting on “growing” their own personnel. In this group, we also observe a minimum rate of attracting pensioners (26%), presumably due to the specifics of the niches of operation (service, light industry), which require high labor intensity.

- medium-sized businesses, which accumulate about 52% of the officially employed population of the region, demonstrate a strategy of “rational stabilization” (Figure 3). This is the link in the economy that has already outgrown “manual management”, but does not yet have excess corporate resources, so every decision here is considered and pragmatic. According to the data, the main vector of their behavior is to preserve existing personnel through integration into state mechanisms for the protection of men (reservation – 59%) and increase wages (57%), while simultaneously placing additional burdens on the functions and responsibilities of employees (43%). To preserve the number of personnel, they actively involve people of older age groups (43%). On the other hand, 30% of medium-sized business respondents noted the implementation of technological solutions at enterprises; usually this is the optimization of management solutions (ERP systems) and automation of lines, which allows involving fewer employees in production processes, or vice versa, developing inclusiveness in production. Also, medium-sized enterprises cooperate with educational institutions the most out of the total number in the issue of training future specialists (32%).

- the behavior model of large enterprises is especially indicative. Indicators with the highest values form a holistic system of measures (Figure 3) aimed at preserving and stabilizing human resources potential in conditions of war and demographic crisis. The key tool for them was the reservation of employees, since 64% of enterprises received the status of critically important. In parallel, large businesses are actively investing in the future through automation and digitalization of processes, which was noted by 45% of respondents. The same indicator of 45% was recorded in the involvement of women in traditionally “male” professions, which is the highest result among all groups. To maintain staff, 59% of companies redistribute responsibilities, and 55% use wage increases and motivation measures. Also, 50% of large players involve specialists aged 60+ in work, compensating for the lack of young personnel. As a result, their strategy is comprehensive: from legal protection of personnel to structural restructuring of production.

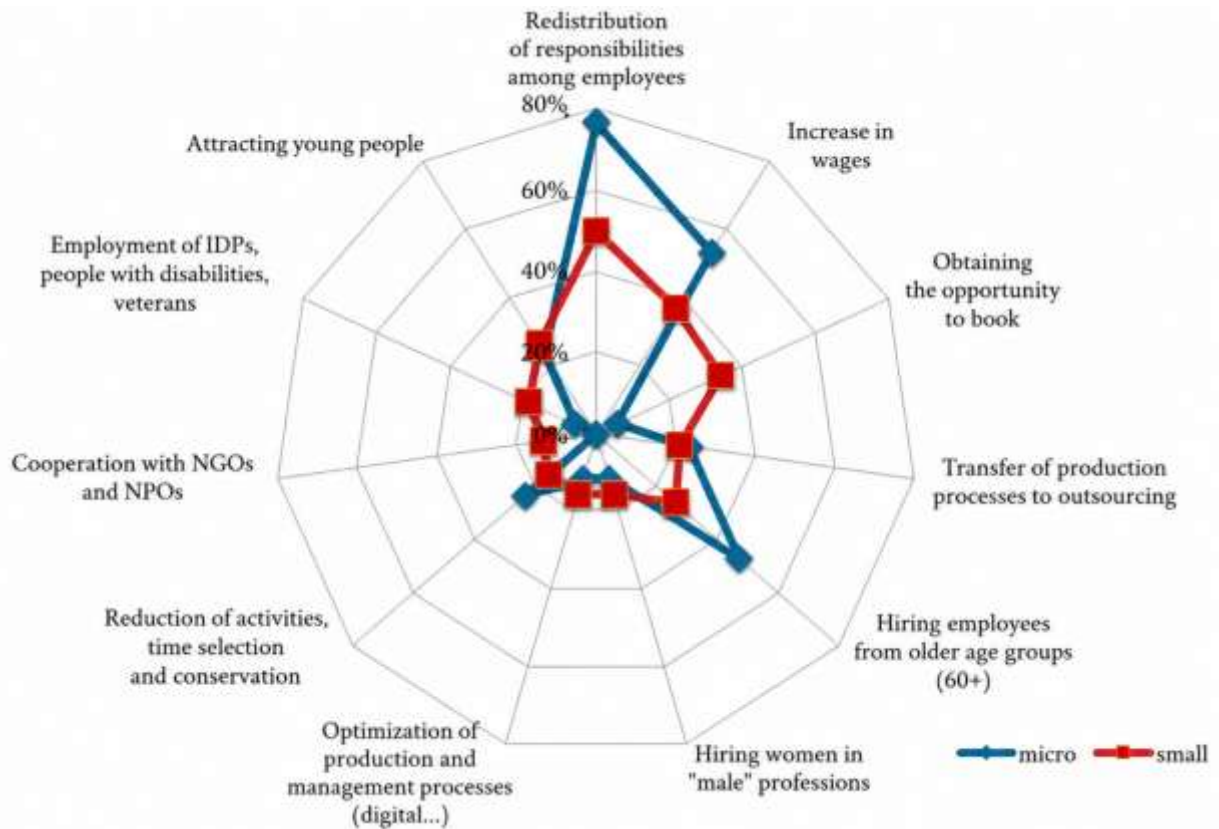


Figure 2. A range of tools for adapting small and micro-enterprises to changes in the labor market in modern war conditions

Source: Built by the authors based on [5].

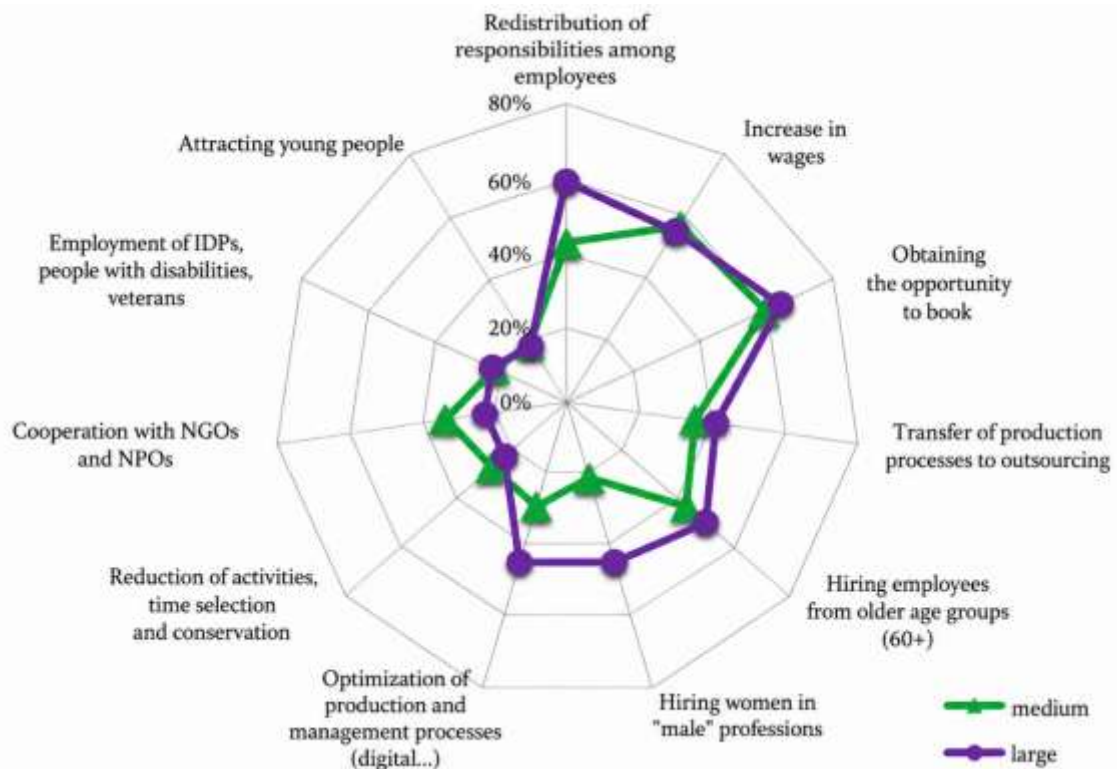


Figure 3. The range of tools for adapting medium and large enterprises to changes in the labor market in modern war conditions

Source: Built by the authors based on [5].

The following sections of the study showed that the main problem of business is the shortage of qualified specialists (44.7%) and engineering and technical intelligentsia (41.2% and 63.6% for large businesses in particular), and to overcome it, 79% of enterprises invest in the development of human capital. However, in the vast majority of cases, investments are episodic or selective, which is quite logical in the conditions of war uncertainty. Predictably, the greatest crisis in this issue is inherent in microbusiness, where 47% of microfirms do not invest in personnel training at all. For medium and large businesses, on the contrary, pragmatism is noticeable (a high share of selective investments – 38% and 36%, respectively). Large businesses are also characterized by a certain institutional stability – this group has the highest level of systemic investments (23%) and the minimum level of complete refusal from training (only 9%). Large industrial or service giants have inertia and established HR departments. In addition, with a shortage of engineers at 63.6%, big business is simply forced to systematically train people within the company, because it is almost impossible to buy ready-made specialists on the Lviv market today.

The latter statement is supported by the next section of the study “Methods of finding employees and the rating from employers by the frequency of using these methods”. The survey results are presented in a processed version in the form of weighted average satisfaction scores for each method exclusively among those enterprises that used it (the scores are distributed proportionally to the share of users of the method). Employers’ ratings ranged from 1 (absolutely dissatisfied) to 4 (completely satisfied), and the scores obtained are presented in the following rating:

1. Job posting on Internet platforms (Work.ua, etc.): 3.31 points (used by 79.8%).
2. Local chats, groups, local media: 3.18 points (used by 71.1%).
3. Company’s own website: 3.11 points (used by 70.2%).
4. Recruitment companies/agencies: 2.91 points (used by 57.0%).
5. State Employment Service: 2.86 points (used by 68.4%).
6. Review of resumes on Internet platforms: 2.73 points (used by 77.2%).
7. Cooperation with ZVET (vocational technical education): 2.72 points (used by 46.5%).
8. “Word of mouth” / publicity in the team: 2.71 points (86.0% used).
9. Cooperation with HEIs (universities): 2.38 points (52.6% used).

The corresponding rating allows us to draw the following conclusions: the wartime shortage of personnel forced Lviv region businesses to switch to digital direct response tools (vacancy sites, local chats), which showed the highest satisfaction of employers. At the same time, traditional institutional channels (HEIs/VET schools) and exhausted “word of mouth” demonstrated a crisis of efficiency, while the modernized State Employment Service actually equaled the quality of selection with commercial recruitment agencies.

6. Conclusions

Despite the positive perception of the socio-economic situation and development of the Lviv region in war conditions against the background of other regions, namely – the remoteness from the front line, the transformation of the region into a logistical and humanitarian hub of the country, the emergence of the region as a center for mass relocation of enterprises and preservation of the number of operating businesses, as a center for directing domestic and foreign investments and integrating numerous IDPs into the life of local communities, we are forced to note the existence of hidden deep destructive tendencies within the business environment of the region, which the empirical study of local enterprises has made it possible to structure quite clearly. First of all, it showed that maintaining a more or less stable number and viability of enterprises in the region has significant difficulties, associated extremely with demographic (structural, migration and security (mobilization)) challenges. The positive aspect of the study is that business partially explains how it is trying to overcome the personnel shortage; the negative aspect is often the uncertainty of personnel retention and training behavior.

The survey results also clearly highlight the main paradox of the official strategies of the Lviv region. While big capital is successfully mastering investments in industrial parks, having systemic support and professional developers for this, small and micro-businesses are in the most difficult situation. This sector is facing a critical shortage of people and a complete lack of planning horizon.

In our deep conviction, it would be logical to conduct a much larger study of this kind with the direct involvement of the OVA, taking into account additional survey criteria. Future results could,

among other things, assess the quality of grant and compensation programs that have been mastered, as well as develop additional proposals for supporting small, micro and medium-sized businesses.

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