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The Interpretation of the Vocative Case in Ukrainian Language Education: Scientific Foundations and Socio–Political Factors

Abstract

The paper traces the dynamics of the interpretation of the grammatical nature of the vocative in Ukrainian grammars from the 16th century until the present. The subject of the analysis is the content and presentation of this category in two sections of Ukrainian grammar books: 1) morphological, which clarifies the status of the vocative in the inflectional paradigm of the noun, and 2) syntactic, in which the means of expressing address are characterized. Based on the findings of the research, various trends in the description of the vocative in different historical periods have been identified, in particular: 1) until the beginning of the 20th, it was unequivocally qualified as an equal member of the inflectional paradigm of the noun, equal to other cases; 2) from the beginning of the 20th century to 1933 was a period of competition between two theories (the vocative is a case the same as others or the vocative is not a true case, but a "special" form in the inflectional paradigm of the noun); 3) the canonization of the "fake case" status theory; 4) from 1991 to the present there has been an unanimity of authors in qualifying the vocative as a case. Comparing the stages of fundamental changes in the scientific definition of the vocative in grammars with defining events in the history of Ukraine provides the basis for discussions about the influence of socio–political factors on the representation of linguistic theories and the codification of the linguistic norms.

Keywords: socio–political factors in linguistics; language education discourse; discursive practice; linguistic norms (standardization); vocative case; nominative case; address; Ukrainian language

1 Introduction

The category of the vocative, whose semantic role is to name a person addressed in the communicative act, belongs to language universals. Despite having been extensively studied, the theoretical understanding of this language phenomenon remains incomplete. Both the semantic complexity and pragmatic potential of the vocative, as well as the peculiarities of its historical development and different systemic manifestations in various, even closely-related languages, have resulted in a broad range of interpretations: as a major grammatical case (Kucherenko, 1961, p. 135; Potebnia, 1958, pp. 100–102), as a peripheral grammatical case (Vykhovanets′, 1987), as an intermediate case between the major and peripheral cases (Skab, 2002, p. 96), as a "fake" case (Brozović, 1999; Isachenko, 1954, pp. 125–126), and as an interjection word (Miklosich, 1868–1874).

In the Ukrainian language, the grammatical status of the vocative goes beyond a purely linguistic domain. To accurately assess its modern functional potential, scholars need to take into consideration historical as well as political backgrounds. With regard to the characteristics of the

three-hundred-year-old history of Ukrainian–Russian relations, one political factor should also be considered: the use of the Ukrainian language was explicitly forbidden under the Russian empire, linguists were repressed, governments revised dictionaries and didactic literature, spelling norms were made to comply with Russian orthography,[1] etc. Political impacts on a language inevitably influence the meta-language, i.e., linguistic and language education (didactic)[2] discourses. Under such circumstances, linguists were compelled to employ acceptable linguistic manoeuvres in order to transmit the official dictum and convince addressees that they should believe the arguments, which were often inconsistent with linguistic facts. Addresses were either reasoned to retain these arguments, or to avoid certain aspects which contradicted language practices or the logic of scientific description. According to Halyna Yavors′ka, "it is quite complicated to differentiate between language control and control over linguistics when it comes to actual examples." [*here and afterwards, unless otherwise indicated, the translation is ours. Authors*] (IAvors′ka, 2000, p. 112). With regard to this, Ukrainian language education discourse requires further research, especially pertaining to theoretical reflections on the vocative. The vocative is one of the morphological forms of the Ukrainian language whose scientific qualification of its grammatical status underwent two drastic changes: after 1933 (the end of the New Economic Policy as well as the Bolshevik Ukrainisation policy) and after 1991 (the year when Ukraine proclaimed its independence). This is not surprising, considering the fact that the vocative case is one of the characteristic features of Ukrainian in comparison with Russian, which has replaced its vocative with nominatives (Borkovskiĭ & Kuznetsov, 1963, p. 211; Tymchenko, 1926, p. 3).[3]

At present, linguists are making isolated attempts to understand the reasons Soviet times saw the canonization of the vocative as a special "form" existing outside the case system. In his monograph, dedicated to the grammar of address in Ukrainian, Mar'ian Skab explains the dominance of this approach by the powerful influence of Russian linguistics (Skab, 2002, pp. 88–89). Anatoliĭ Zahnitko notes that when studying the functional parameters of the vocative, it is worth paying special attention to the history of its qualification in different periods of the development of the grammatical system and taking into consideration the external factors that limited its use (A. Zahnitko, 2020, pp. 131–132). The researcher examines different views regarding the grammatical status of the vocative case against the background of the interpretation of this category in the grammars of various Slavic and non-Slavic languages (A. Zahnitko, 2021). In this respect, Liudmyla Vasyl′ieva provides an interesting paper in which she compares the grammatical features and peculiarities of the use of the vocative in Ukrainian and Croatian (Vasyl′ieva, 2017). Among other things, the author points out that the features of the vocative function in the two languages were influenced by the fact that for a certain time in both Ukrainian and Serbo–Croatian grammars it was excluded from the case system and considered a "special form". There have also appeared works studying the reasons why nominatives are extensively used with an addressing function in modern language practice (Kobchenko, 2021; Yasakova et al., 2022).

Despite linguists' awareness of the need to analyse the concept of the vocative which was popular in the works of the Soviet period, "the period when morphological and syntactic norms were proscribed" (A. Zahnitko, 2020, p. 132), and to assess its consequences for both modern theory of grammar and linguistic practice, such a project has not been implemented yet. With regard to this, the purpose of our research is to describe the dynamics of the qualification of the grammatical status of the vocative in Ukrainian grammar books of the late 16$^{\text{th}}$ – early 21$^{\text{st}}$ centuries, and to trace the influence of social factors on how this language category is presented in language education works.

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[1] Certain aspects of this issue have already been covered in a number of linguistic papers (Danylenko & Naienko, 2019; Goletiani, 2017; Karunyk, 2017; Masenko, 2017; Shevelov, 1989).

[2] Some researchers prefer the term "linguodidactics" in this meaning, but its usage seems to be limited only to former Soviet and present post-Soviet scholars.

[3] The so-called "new vocatives" (Andersen, 2012) are not considered in this paper, as they are vernacular reflexes only, and standard Russian grammar books define just six cases (*Russkaia grammatika*, 2005, p. 475).

Analysis of works ranging from the dawn of the formation of grammatical thought in Ukraine up to the present enables the realisation of several important tasks: 1) to establish whether the concept of the vocative, canonised in Soviet times, reflects the consistent development of its understanding by academics; 2) to outline a holistic picture of the formation of Ukrainian language educational discourse, against the backdrop of which it is possible to evaluate how the discursive practices of the Soviet period are correlated with tradition, and to establish with the help of which techniques ideological narratives are embodied; 3) to establish the consequences of the implementation of a unified explanation of the vocative in Soviet textbooks for the development of grammar in general and language education in particular in the post-Soviet period.

The structure of the paper is aimed at the gradual achievement of the aforementioned aims. In section 2, the morphological features, syntactic purpose, and lexical range of the vocative case in Ukrainian are outlined. Section 3 consists of five subsections, which outline the discursive practices of qualifying the morphological status and syntactic function of the vocative case in different historical periods.

2 Methodological and Theoretical Background

The application of the discursive approach in order to achieve the scientific aims of the paper will assist in assessing the influence of political factors on the formation of the theoretical provisions of scientific texts. Some other extra-lingual factors, such as the time and place of the analysed works, their direct (citation, same author, reprint) and indirect (chronotope) relations to other works, etc. have also been taken into account. The research material also includes ancient grammars, which will make it possible to trace the entire path of the formation of modern language norms regarding the expression of address and to outline the scientific tradition of covering this issue. Language norms are understood as "a set of linguistic means which correspond to the language system and are universally accepted by the speakers as a model of social communication in a certain period of language and society development" (Rusanivs′kyĭ et al., 2004, p. 420). Given the fact that descriptive grammars (textbooks and manuals) are involved in the analysis, i.e., works whose main purpose is to be a source of language norms and to establish them through the domain of education, we use the term "language education discourses" to designate the object of research. The analysis of the language education discourses of the Soviet and modern periods is conducted through the study of grammar books for higher education institutions. Firstly, they are a source of norms which are repeated in secondary school books; secondly, university books are a source of language norms for aspiring teachers, journalists, actors, etc. who then promote the norms in society.

Establishing common approaches to the study of the vocative, based on data involving different languages, is complicated by terminological aspects. The point is that some scholars use the term "vocative" to denote two categories that are found at different levels of a language system: 1) to designate one of the forms of the case paradigm of a noun (the morphological expression of the vocative) and 2) to designate a component of a sentence in order to identify someone as the addressee of speech (the syntactic expression of the vocative) (e.g., see Schaden, 2010). Such terminological ambiguity may not cause methodological difficulties when dealing with languages in which there is either no formal noun paradigm at all (i.e. when case is not a morphological category), or the vocative case has declined in the process of historical development. However, with regard to the languages where the case category is expressed at the morphological level, and the vocative has specific inflections, this may lead to confusion. Thus, the addressees in such languages can be expressed in a sentence both by a noun in the vocative form, and by a substantivized word, a combination of words, or even the equivalent of a sentence. In order to avoid such terminological ambiguity, researchers of the Serbian and Croatian languages suggest distinguishing between the concept of "vocative" (to denote this case a as a morphological category) and "vocativeness" (to denote a component of a sentence identifying the addressee of speech) (Glušac & Mikić Čolić,

2017, p. 449; Piper & Klajn, 2013, p. 317). In the Ukrainian grammatical tradition, two terms have been established to refer to the aforementioned concepts: vocative, one of the constituents of the case system of the noun (morphological expression) and address ("appellation"), a component of the sentence indicating the addressee of the message (syntactic level). Both these terms will be used in this paper.

For Ukrainian, it is reasonable to interpret the case category as a cross-level morphological and syntactic one, as its manifestation occurs at both these levels. Each case (a morphological form of a noun) is specialised for a certain syntactic function, which is the primary categorical function for it. When a case performs the categorical function of another case or the function of another part of speech, it acquires its secondary categorical function or transcends the boundaries of "objectivity" (*predmetnist′*; *referring to objects*) (Vykhovanets′, 1987, pp. 50–51, 52–58). Therefore, the existence of a certain case is supported by its syntactic function. If this function is assumed by another morphological form, the case declines.

In modern Ukrainian, the vocative case has formal markers – specific inflections – for feminine and masculine nouns of the singular. For neuter singular nouns and all plural nouns, the morphological form of the vocative case is homonymous with the nominative case forms. At the semantic–syntactic levels of the sentence, the vocative performs three functions (Vykhovanets′, 1987, pp. 140–142; A. Zahnitko, 2020, p. 138), but all of them are united around the meaning of the speech addressee and projected into the formal–syntactic position of address: 1) the function of the addressee – the potential agent, e.g.: (1); 2) the function of an accented addressee – a neutralised agent, e.g. (2); 3) identification function, e.g. (3).

(1)   *Sterezhit′ ïï, ianholy, berit′ pid krylo lehke* (Serhiĭ Zhadan) [Guard her, angels, take her under a light wing].

(2)   *Mamo, pomaranchi khochu, – tykhen′ko ozvalas′ Olenka, mov sprosonnia* (Vasyl′ Barka) ["Mother, I want oranges", Olenka said quietly as if half-awake].

(3)   *Shcho znaishov ty, Habre? I shcho vtratyv?* (Iaroslav Mel′nyk) [What have you found, Gabr? What have you lost?].

Potentially, any noun in the Ukrainian language can acquire the vocative form, although its syntactic specialisation limits the lexical range of words that regularly gain this morphological form in linguistic practice. These are mostly the names of persons, since the addressees of speech acts are usually persons. Other nouns (animate impersonal names and inanimate nouns) acquire the forms of the vocative case only in special communicative situations, such as poetic speech, auto-communication, in cases involving a quasi-addressee, etc. (see IAsakova, 2016, pp. 255–256). The pragmatic potential of the vocative is determined by its central role in the expression of appeal (address) (Skab, 2002, p. 83, 2003, p. 31; A. Zahnitko, 2020, p. 139).

3   Interpretation of the Grammatical Status of the Vocative in Grammatical Descriptions of the Ukrainian Language in the 16th–21st Centuries

Traditionally, in grammars of the Ukrainian language, information on the vocative case appears in two sections: 1) in "Morphology" its place in the case paradigm is outlined and the inflections acquired by nouns of different cases in this form are described; 2) in "Syntax" its function in the structure of the sentence is characterised as a means of expression of address. However, some grammars do not contain both these sections and only describe either the morphology of the vocative or their syntax. Therefore, some grammars cannot trace the correlation between the interpretation of the morphological status of the vocative and the definition of its syntactic function. This fact does not distort the results of our research, as individual grammar books belong to a single language

education discourse, and an adequate analysis of the content of a specific manual is possible only in the context of the content of other grammars.

3.1 Information on the Case System in Grammars of the 16th–18th Centuries

Most grammars of this period do not contain any sections on syntax and even in those in which it is presented (Meletii Smotryts′kyi, Arsenii Kotsak), there is no information on the category of address. Therefore, based on these works, it is possible to form an idea only about the interpretation of the status of the vocative in the case system of the noun. In the grammar books of the late 16th century, the nominal paradigms cover a different number of cases (ranging from five in *Adelphotes*[4] to seven in Meletii Smotryts′kyi's grammar), but it is noticeable that the vocative was present everywhere (*Adel′fotes*, 1591, p. 13; Smotritskiĭ, 2000, pp. 169–170; Zizaniĭ, 2000, p. 49). In *Adelphotes* and Laurentius Zyzanii's grammar, the vocative case was the last in the list of cases; Meletii Smotryts′kyi places it in fifth position (preceded by the instrumental and locative). The basis for distinguishing the vacative, like the rest of cases, in the mentioned grammars is special inflections, but not its syntactic function.

It is noteworthy that after Meletii Smotryts′kyi's work was published in 1619, grammatical descriptions of the Ukrainian edition of the Church Slavonic language only appeared in the late 18th century.[5] Moreover, many of them remained in manuscripts and never reached the reader (Dem′ianiuk, 2006, p. 190). According to researchers, all grammatical descriptions of the 18th century (*Grammar of the Slavic Language* by Iakiv Blonyts′kyi, *Brief Compendium* allegedly written by M. Liubovych, in Vasyl′ Nimchuk's opinion, *Grammar of the Church Slavonic Language by Arsenii Kotsak*) are based on the work of Meletii Smotryts′kyi's and the case system and inflectional paradigms of the noun are described in them following Smotryts′kyi's model, with only minor deviations in some case forms (Dem′ianiuk, 2006, pp. 89–106, 126, 136). Accordingly, the authors of these grammars promote a septempartite case system, except for Arsenii Kotsak, who distinguishes eight cases (Dem′ianiuk, 2006, p. 142).

3.2 The Grammatical Status of the Vocative in Grammatical Descriptions of the 19th Century

Throughout this period, only one Ukrainian grammar was published in the territory of East Ukraine, namely, *Grammar of the Little Russian Dialect* by Oleksii Pavlovs′kyi. Its morphological section does not include lengthy theoretical comments. The author presents samples of inflectional patterns of various parts of speech with occasional brief remarks on certain forms. Five groups of nouns are identified here according to the type of inflection, and the vocative case form is given for the nouns of each group. The vocative case was given fifth position among other cases, as in Meletii Smotryts′kyi's work (Pavlovskiĭ, 1818, pp. 5–9). Meanwhile, in West Ukraine more books on grammar were actively published in this period. Their authors aimed to describe and codify the relevant subsystems of the Ukrainian language. Halyna Matsiuk claims that grammar books of this period "were the first ones to develop scientific knowledge of the characteristics of the

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[4] However, Vasyl′ Nimchuk points out that *Adelphotes, Grammar for the Correct Use of the Helleno–Slavonic Language* distinguished only nominative, genitive, dative, and accusative cases (*именóв(ъ)ный, рóдный, дáтелный, винóвный*) (Nimchuk, 1985, p. 51). This seminal work has been studied again for this paper, and additionally, a fifth case has been established. On page 10 (pagination is in pencil), four cases are enumerated and the vocative is mentioned in the following sentence. On page 13, grammatical features of the noun are presented, and now five cases are mentioned. Moreover, Vasyl′ Nimchuk himself has mentioned that the authors of the grammar book usually name both the nominative and vocative cases as direct ones in his further research.

[5] In 1643 *Slavic Grammar* (*Gramatyka Slovenskaja*) by Ivan Uzhevych was published, but it occurred in Paris and the then Ukrainians knew nothing about it (Nimchuk, 1985, pp. 155, 161). Therefore, it has not been covered for the purposes of this paper.

Ukrainian language standard, which accelerated Ukrainian linguistics as one of the subjects of Slavic studies" (Matsiuk, 2004, p. 4).

In the grammars of this period,[6] seven cases of the noun are declared, among which the vocative occupies fifth place (Diachan, 1865, pp. 22–23; Holovats′kyǐ, 1849, pp. 53–54; I. Ohonovs′kyǐ & Kotsovs′kyǐ, 1894, pp. 18–19; O. Ohonovs′kyǐ, 1889, p. 84; Osadtsa, 1862, p. 54; Partyts′kǐǐ, 1883, p. 20; Wagilewicz, 1845, pp. 18–19). Each case is accompanied by respective questions, and an explanation is given next to the vocative, such as "identifier of the object that we speak to" (Wagilewicz, 1845, p. 19) or "the fifth case is used when we call someone" (I. Ohonovs′kyǐ & Kotsovs′kyǐ, 1894, p. 19). Most scholars follow Meletii Smotryts′kyi's terminology, and call the vocative an "addressing" case "*zvatelnyj*" (*звателный*). *Grammatyka języka Małoruskiego* by Ivan Vahylevych is written in Polish, although Church Slavonic equivalents are given to the main terms in parentheses. Grammar book by Mykhailo Osadtsa and Omelian Ohonovs′kyǐ provide Latin equivalents in parentheses. Some grammars case names are not given but are instead indicated by ordinal numbers (Diachan, 1865; I. Ohonovs′kyǐ & Kotsovs′kyǐ, 1894).

A somewhat controversial view of the vocative is expressed by Omelian Ohonovs′kyǐ. On the one hand, he qualifies the vocative as a direct case on a par with the nominative (O. Ohonovs′kyǐ, 1889, p. 85), and on the other hand, he claims that the vocative does not hold any relations with other words in the sentence, and therefore does not constitute a genuine case. The linguist notes that the vocative relates to other case forms as the interjection does to other parts of speech (O. Ohonovs′kyǐ, 1889, p. 181).

The grammar books which also contain a section on syntax provide coverage of the syntactic specialisation of cases. Ivan Vahylevych, in particular, describing which members of the sentence can be expressed by each case, notes about the vocative: "it identifies the person addressed" (Wagilewicz, 1845, pp. 138–139). In the grammar of Mihajlo Osadtsa, we encounter the first remark regarding the possibility of the nominative to perform the role of address: "We often use the nominative case instead of the vocative, especially when the address is expressed by two nouns, one of which is already in the vocative: *Pane profesor! Pane maister! Ne zalysh mene, Hospody, otets′ myloserdnyi* [Mr. Professor! Mr. Master! Don't leave me alone, Lord, Father of Mercy]" (Osadtsa, 1862, p. 216). There is also a note on the stylistic differentiation of the nominative and the vocative cases in the function of address: "If anyone is threatening another person or expressing his utmost disrespect, then he addresses with the nominative forms: *storozh, vidchyniai, povozhchyk, zaiizhdzhai* [janitor, open up; cabman, drive in]" (Osadtsa, 1862, p. 216). Omelian Ohonovs′kyǐ notes that the nominative case is used instead of the vocative only occasionally (O. Ohonovs′kyǐ, 1889, pp. 181–182).

In 1830, Michaelis Luchkai's *Slavic–Russian Grammar* was published in Budapest. The book is written in Latin and the examples are provided in Cyrillic. In the noun inflection system, the author identifies seven cases, with the vocative case traditionally occupying the fifth position. This work contains no reservations about the status of the vocative case. Examples of this case are provided for singular and plural nouns of all types and the inflection options are explained in the comments, as for the other cases. In 1989, the Institute of Linguistics of the Academy of Sciences of Ukraine republished this book in two volumes: a phototype copy of the 1830 publication and a translation into Ukrainian. It is noteworthy that the term "vocative form" appears everywhere in the translation to indicate this case (Luchkaǐ, 1989, pp. 74–75), which, taking into account the official position of the Institute of Linguistics in the Soviet period, should be considered the translator's interpretation. What makes it especially surprising in this translation is that "vocative form" in the examples of noun paradigms is placed within cases – in the fifth position, before the instrumental and locative.

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[6] A well-known "Грамматыка ѧзыка Славено-руѠкогѠ" (*Grammar of the Slavic Ruthenian Language*) by Ivan Mohyl′nyts′kyi is not a part of the language education discourse of this period, as it was written in 1824 and published only in 1910. This means the readers of the 19th century knew nothing of it.

3.3   Interpretation of the Vocative from the Early 20th Century to 1933

The disappearance of the ban on the use of the Ukrainian language and the loosening of the censorship restrictions in the Russian Empire, and later the complete absence of government control in the scientific domain as a result of the revolutionary events of 1917 and the Bolshevik policy of Ukrainisation, all facilitated the development of Ukrainian linguistics. Scholars faced urgent needs, such as the creation of grammars to study the Ukrainian language at all levels (ranging from primary to high schools, both for formal education and self-study), as well as standardisation of the spelling system and the development of style guides and reference books. The policy of the Austro–Hungarian Empire (which included the Western Ukrainian lands) of this period was also characterised by a certain liberalisation with regard to the colonised nations. Therefore, the progressive development of grammatical thought had been advancing there since the second half of the 19th century. The most significant works of this period included grammar books by Stepan Smalʹ-Stotskyi, Theodor Gartner, and Vasylʹ Simovych.

The interpretation of linguistic phenomena in the grammar books of this period is marked by the pluralism of scientific approaches. In particular, certain disagreements are observed regarding the qualification of the grammatical status of the vocative. Firstly, some Ukrainian linguists, influenced by European researchers, refuse to qualify the vocative as a fully-fledged case and use the term "vocative form" instead (see Biletsʹkyĭ et al., 1927, p. 12; Nakonechnyĭ, 1928; Sulyma, 1928). A certain scholastic ambiguity concerning the grammatical status of the vocative is vividly illustrated in the co-authored book *Advanced Course of the Ukrainian Language* edited by Leonid Bulakhovsʹkyi. First, O. Patokova, the author of the section on nominal inflections, states that there were seven cases in the Ukrainian language noun paradigm: "The seven forms by which nouns in the Ukrainian language are inflected have more than seven endings. Each case has at least two inflections, and some have more" (Bulakhovsʹkyĭ, 1931, p. 135). In the following comments, describing the endings in different cases, O. Patokova uses the term "vocative form" (Bulakhovsʹkyĭ, 1931, p. 145). Hryhorij Ivanycja, the author of *Brief Course of the Ukrainian Language with a Textbook*, written in Russian, uses both the terms "vocative form" (Ivanitsa, 1927, p. 67) and "vocative case" (Ivanitsa, 1927, p. 70). Ievhen Tymchenko, on the other hand, clearly justifies the case status of the vocative. In his monograph, dedicated to the vocative, the linguist analyses in detail both approaches to this category and argues that to qualify the vocative as a "form", in contrast to other cases, is not only to deny its grammatical nature, which is the same as other cases, but also to assume a methodological error, because "nominal inflection forms are actual cases" (Tymchenko, 1926, pp. 2–3). It is interesting that the vocative is referred to as the "vocative form" both in the *Ukrainian Spelling Project* and the 1929 *Ukrainian Spelling* itself (*Ukraïnsʹkyĭ pravopys*, 1929, pp. 32–33; *Ukraïnsʹkyĭ pravopys: Proiekt*, 1926, pp. 38–39).

Secondly, in this period, the term to mark the analysed case had not yet been completely established. The term "vocative case" (*klychnyi vidminok*)[7] still dominates, although occasional alternatives for the vocative were coined by some authors: "*klychnyk*" (Simovych, 1919, p. 146), "*klykalʹnyi vidminok*" (Nechuĭ-Levytsʹkyĭ, 1913, p. 14), "*zovnyi vidminok*" (Kurylo, 1918, p. 23) as well as an international term "*vokatyv*" (the vocative) (Hrunsʹkyĭ & Kovalʹov, 1931, p. 45). In some places, the tendency of the previous period to refer to cases by their ordinal numbers was still preserved (Smalʹ-Stotsʹkyĭ & Gartner, 1914, p. 60).

Thirdly, compared to the previous period, the scholars of this time were not unanimous in determining the ordinal position of the vocative in the noun paradigm. In most grammatical works, it was still in fifth place, preceding the instrumental and locative cases (Krymskiĭ, 1907, p. 35; Levytsʹkyĭ, 1923, pp. 58–59; Nechuĭ-Levytsʹkyĭ, 1913, p. 14; Simovych, 1919, p. 146; Smalʹ-Stotsʹkyĭ & Gartner, 1914, p. 60; Tymchenko, 1917, p. 91; Zaloznyĭ, 1912, p. 18). However, in some works it was suggested that the vocative be placed in last position (Grunskiĭ, 1918, p. 20; Horetsʹkyĭ & Shalia, 1929, p. 97; Ĭogansen, 1924, p. 34; Sulyma, 1928) or in second position,

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[7] Grammar books written in Russian used "*звательный падеж*" for vocative case (Gladkiĭ, 1917, p. 14; Grunskiĭ, 1918, p. 20; Ĭogansen, 1924, p. 34; Krymskiĭ, 1907, p. 35).

after the nominative (Syniavs′kyĭ, 1931). It is noteworthy that in the second position, after the nominative case, the vocative is placed in the *Ukrainian Standard Spelling* of 1929, as well as its earlier version of 1926 (*Ukraïns′kyĭ pravopys*, 1929, pp. 32–33; *Ukraïns′kyĭ pravopys: Proiekt*, 1926, pp. 38–39).

Grammar books of the analysed period had already established a tradition to describe the vocative at two levels of the language system – morphological and syntactic. The information pertaining to this grammatical case was provided in the section "Morphology", highlighting the inflection of the noun, and in the section "Syntax", outlining the specifics of the appellative sentence component. The authors are unanimous regarding the fact that in the Ukrainian language the vocative is the only way to express address. Cf. "it is not acceptable to substitute the vocative case for the nominative one" (Krymskiĭ, 1907, p. 35); "words for address (*obertal′ni slova*) are always used in the vocative case" (Nechuĭ-Levyts′kyĭ, 1914, p. 16); "the fifth case cannot be replaced by the first" (Simovych, 1919, p. 150); "the vocative is never substituted for the nominative" (Levyts′kyĭ, 1923, pp. 65–66); "its use is obligatory" (Ĭogansen, 1924, p. 34). However, some of these linguists mention those instances when nominatives are used for address, outlined by M. Osadtsa (see Krymskiĭ, 1907, pp. 35–36; Simovych, 1919, p. 150; Smal′-Stots′kyĭ & Gartner, 1914, p. 65). e.g. (4).

(4)   *pane maister!*, *pane likar!*, *pane vchytel′!* vs. *pane maistre!*, *pane likariu!*, *pane vchyteliu!* [Mr. Master! Mr. Physician! Mr. Teacher!] (examples from: Krymskiĭ, 1907, pp. 35–36; Simovych, 1919, p. 150; Smal′-Stots′kyĭ & Gartner, 1914, p. 65)

The analysis of the grammar books belonging to this period shows that linguists began to use the method of juxtaposition in the presentation of theoretical material:

1. the comparison of two facts of the case system, namely the morphological forms of the vocative and the nominative. Some grammarians emphasise that not all nouns in the vocative have specific inflections. In certain situations these inflections are identical to the inflections of the nominative case. Stepan Smal′-Stots′kyi and Theodor Gartner note that in the plural, the vocative form is always identical to the plural of the nominative form (Smal′-Stots′kyĭ & Gartner, 1914, p. 65). Mykola Sulyma offers a clear explanation on this matter: "In the Ukrainian language, masculine and feminine nouns still have a separate vocative singular form, which is not similar in appearance to the nominative case (except for the word *maty* [mother]). In all other cases, the vocative form is similar to the nominative" (Sulyma, 1928, p. 42);

2. the comparison of the grammatical features of Ukrainian with the corresponding features of Russian. Addressing the question of the vocative, many grammarians explicitly or implicitly compare the case system of the Ukrainian and Russian languages. Some linguists directly emphasise that the presence of the vocative case is a feature distinguishing Ukrainian from Russian (Ĭogansen, 1924, p. 34; Krymskiĭ, 1907, p. 35). Vasyl′ Simovych notes that, unlike in Russian grammar, in Ukrainian it is not even advisable to use a special term – address – to define its syntactic role, since Russian "does not know of the vocative case, it is always substituted (with a few exceptions) by the nominative, and thus, special attention should be paid to the use of those forms in a vocative role" (Simovych, 1919, pp. 476–477). Conversely, in Ukrainian there is a special morphological form, the vocative case, which signals the function of the lexeme formed by it (Simovych, 1919, pp. 476–477). Implicit comparison can be observed when the comparison with Russian is not verbalised in the presentation of the material, but the author, characterising the vocative, uses the lexeme "preserved", e.g.: "vocative case forms are preserved *mamo*, *Ivane*, *Hrytsiu*, *koniu*, *orle*, *choloviche*, *babo*, *dytyno*, *svite*, *svate*, *brate*, *kozache*, *druzhe*, *bairache*, *synu*, *didu* [mother, Ivan, Hryts′, horse, eagle, man, grandmother, child, world, son/daughter-in-law's father, brother, Cossack, friend, hollow, son, grandfather], etc." (Gladkiĭ, 1917, p. 14). The presupposition of such formulations is "the Russian language has lost its vocative case".

Another novelty of the language education discourse of this period is that language norms were implicitly compared with language practice. The result of this implicit juxtaposition is given in the author's remarks about interference, e.g. "The vocative case is never to be replaced by the nominative case, as is done by Russified speakers" (Levyts′kyĭ, 1923, pp. 65–66); "In the language of the modern intelligentsia, in such cases, the nominative case is often used instead of the vocative form; this is a Russianism" (Sulyma, 1928, p. 43); "Under the influence of and in the (current) language of the Ukrainian intelligentsia, specific forms of the vocative are often ignored" (Nakonechnyĭ, 1928, pp. 112–113).

3.4 The problem of the Vocative in the Ukrainian Language Education Discourse of the Soviet Period

This stage began with the introduction of total and harsh control over all areas of social life, including science. Ukrainian linguistics, Ukrainian language practice and Ukrainian society in general saw this period start with the designation of the 1929 spelling norms as bourgeois and nationalist. New orthography rules, based on Russian language norm/spelling traditions, were adopted. Apart from other changes, a distinctive feature of the 1933 spelling rules was the elimination of the vocative case from nominal inflection paradigm examples (*Ukraïns′kyĭ pravopys*, 1933, pp. 30–31). However, it is interesting to note there were some comments and remarks on the "vocative form" inflections for "some" nouns of the first and second declensions (*Ukraïns′kyĭ pravopys*, 1933, pp. 35–36, 40). Historiographers of linguistic science highlight that in the late 1930s students of university language schools were deprived of most manuals covering Ukrainian grammar as a result of bans and the removal from use of works of the 1920s and 1930s. In order to at least somehow improve this situation, university teachers began to issue methodological recommendations for studying courses, which concisely presented the material in the curriculum (ZHovtobriukh, 1991, pp. 216–217). This situation lasted until the end of the 1940s, when B. Kulik's textbook for non-philological faculties of universities appeared (1948) and two parts of the book *Ukrainian Language* from the *University at Home* series (1949). In 1951, the first scientific work which covered all levels of the language system, *Course of the Modern Ukrainian Literary Language* (1951), was published in two volumes, edited by L. Bulakhovskyi. During the next decade, it was actually the only textbook on Ukrainian grammar used to train philologists. Further grammars began to appear only in the 1960s, and during 1969–1973, an academic grammar of the Ukrainian language was published in five volumes edited by I. Bilodid. Most grammars of the 1970s and 1980s were mostly oriented towards this work.

One of the prominent features of the Soviet language education discourse was its monologue. By the 1980s, all grammar books had their own "canon", represented by six grammatical cases and a "special" vocative form, and any other approaches to qualify the vocative were not mentioned. Only the multiple authors of the *Grammar of the Ukrainian Language* (1982) mentioned some linguists who believed that the "vocative form" constituted the seventh grammatical case (Vykhovanets′ et al., 1982, p. 67), but they never provided these linguists' names. In most grammar books of the period, the lack of the grammatical status of the vocative case was usually given as an irrefutable fact without any supporting arguments. Only two publications of the late 1970s–1980s provided some explanation: "Vocative forms do not express any syntactic relations, so they do not belong to the category of cases." (Medushevs′kyĭ et al., 1975, p. 188); "The primary reason is that nouns in a vocative form transcend the syntactic relations system and avoid the functions of the sentence members" (Vykhovanets′ et al., 1982, p. 67).

Still, there were some Soviet Ukrainian linguists who qualified the grammatical status of the vocative as a case. At first, this opinion was given in Illia Kucherenko's monograph, which stated that the nominative and vocative cases are direct "subject cases" as "the nouns in these cases refer to things and phenomena in their relation of independence from other things and phenomena as cognisable phenomena" (Kucherenko, 1961, p. 135). In the 1980s, the qualification of the vocative as a grammatical case was given in a higher education textbook book by Mariia Leonova (1983, pp.

53–54), who followed Illia Kucherenko's arguments. Ivan Matviias, in his monograph *Nouns in the Ukrainian Language*, qualified the vocative as a grammatical case and stated that "functionally it is comparable to the nominative case" (Matviias, 1974, p. 22). Simultaneously, in the chapter "Nouns" of the academic course *Modern Standard Ukrainian Language*, edited by Ivan Bilodid, six cases for the noun inflection system with a vocative form added were presented (Bilodid, 1969, p. 76). In 1962, in a morphology course book for part-time students, this linguist avoided any unambiguous statements about the number of grammatical cases and used two alternative names of the "vocative case or form" (Matviias, 1962, p. 26). In addition, there was an important monograph, *The Case System of the Ukrainian Language* by Ivan Vykhovanets′ (1987), which argued against the usage of the term "vocative form" and argued instead that all case features are characteristic of the vocative: a formal marker (specific inflection) as well as semantic–syntactic and formal–syntactic specialisations (Vykhovanets′, 1987, pp. 138–140).

It is notable that in Soviet times the qualification of the vocative as a case only occurred in monographs which were aimed at a much narrower target audience compared to that of textbook readers. Such works belong to scientific discourse proper, but not language education. Thus, Soviet language education discourse can be considered totally unequivocal.

Grammar books of this period provided a logically faulty system of relations implemented at three levels: 1) the structure of the educational matter, 2) the description of the noun paradigm, and 3) correlations between chapters on morphology (which described the case system) and chapters on syntax (revealing the address components of the sentence).

Logical faults of the first type can be represented by the first "official" textbook published after the introduction of the 1933 spelling rules.[8] The chapter on noun inflections stated there are six grammatical cases (Kahanovych & Shevel′ov, 1935a, p. 18), and that examples of noun declension in various groups did not provide any vocative forms (Kahanovych & Shevel′ov, 1935a, pp. 18–19, 21–24). Nevertheless, the authors of the grammar book did later give some explanation on parallel or variant inflection forms in different cases characterising also noun inflections for vocative forms (Kahanovych & Shevel′ov, 1935a, p. 21).

Logical faults of the second type are represented in many publications from the period in question. Linguists claimed that the vocative is not a case, although their arguments were dubious in their wording or even provided reasonable grounds to doubt their claims. Take the aforementioned Ivan Matviias, one of the academic grammar book authors, who argued that a vocative form "does not express any object relations and so can be considered a case only conditionally" (Bilodid, 1969, p. 74) at the beginning of a paragraph on the nominal category of grammatical person. Further on, he compared the nominative and vocative potential to express the semantics of a grammatical person and concluded that "a vocative form is the element of grammatical person-and-case paradigm, and as it is opposed to the nominative case form it cannot be considered beyond the case paradigm" (Bilodid, 1969, p. 74). While discussing the nominal category of grammatical case, Ivan Matviias enumerated them and used the term "case form", but not a "case": "Modern Ukrainian has six case forms and each of them can take specific questions. Besides, as was stated earlier, the case forms system also includes a vocative form used to express address. The cases are…" Further on, a list of cases was given which ended with a "vocative form" (Bilodid, 1969, p. 76). The sub-section on the meaning of grammatical cases provided an additional explanation for this vocative form: "The vocative form formants share the same type of case inflections and are seen within the paradigm of singular case forms" (Bilodid, 1969, p. 81). Thus, a number of reasonable questions arise: How can a nominal paradigm contain the elements of various grammatical nature? How can a vocative form be "included in a system of case forms" and simultaneously

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[8] It is highly ironical that the aforementioned book was used for a short period of time as its authors happened to become "public enemies". Although Naum Kahanovych participated in the 1933 spelling reform commission and vehemently blamed his colleagues who were "bourgeois nationalists", he was still taken into custody in 1937, repressed, tried and executed for his alleged membership in the "Ukrainian counterrevolutionary nationalistic organisation". The name of George Shevelov (Iurii Shevel′ov) was forbidden following his emigration abroad in WWII.

reject the status of case form? If vocative form formants share "the same type of case inflections and are seen within the paradigm of singular case forms" then why is it excluded from other cases and refused the same status? No less ambiguous claims also occurred in other grammar books. For example, the list of grammatical cases was followed by a statement that "apart from these grammatical case forms, a vocative form is used" (Dolenko et al., 1974, p. 148); "The case system includes a vocative form used to express address" (Volokh et al., 1976, p. 125); or see the chapter name "The System of Cases. Vocative Form" (Vykhovanets′ et al., 1982, p. 65).

Finally, the logical faults of the third type are represented by grammar books which contained chapters both on morphology and syntax. Sometimes their authors mentioned the competition of the nominative and vocative as a form of address when discussing the topic of morphology, but within the topic of syntax they still reduced the issue to the grammatical function of address and only mentioned a "vocative form" among the means of address. For example, Naum Kahanovych and George Shevel′ov's textbook has a note in its first part that "a form of the nominative case is also used in addressing", and elsewhere in the second of the book they claimed that "address takes the vocative form and has no grammatical relations with other parts of the sentence" (Kahanovych & Shevel′ov, 1935b, p. 21).

Another notable feature of Soviet Ukrainian language education discourse, if compared to the previous stage of its development, was a nearly total absence of information on contrasting relevant phenomena of the Ukrainian and Russian languages. Only Makar Ivchenko seemed to have applied this method: "Contrary to the Russian language, some Ukrainian nouns (mostly animate ones) also have so-called vocative forms used in addressing" (Ivchenko, 1960, p. 260). However, the phrase "so-called" implied unreliability, as if Ukrainian grammar had something difficult to describe in comparison with Russian. The semantic levelling of the referred language features was not a rare occurrence in the grammar books of the period (see Bulakhovs′kyǐ, 1951a, p. 306; Dolenko et al., 1974, p. 149; Kulyk, 1948, p. 103).

Russian–Ukrainian language interference issues also disappeared from grammar books, due to the fact that commenting on nominative case usage as address, caused by Russian influence, was an obvious contradiction of the official theory of the "beneficial impact of the Russian language on Ukrainian" (for more details see Shevelov, 1989, pp. 141–174). An interesting case in point was the publication history of *The History of Ukrainian Language Forms* by Mykola Hruns′kyi and Panteleimon Koval′ov (Kharkiv, 1931) and its second edition titled *Essays on Ukrainian Language History* (L′viv, 1941[9]; Hruns′kyǐ & Koval′ov, 1941). At first, the authors used the terms "vocative case" and "vocative" (Hruns′kyǐ & Koval′ov, 1931, p. 45) and then switched to "a vocative form" (Hruns′kyǐ & Koval′ov, 1941, p. 108). Moreover, they changed their opinion on the vocative's functional competition with the nominative case. The first edition of the book clearly stated that nominative forms in the vocative function were caused by Russian language influence or remained from the previous stages of Ukrainian language formation (Hruns′kyǐ & Koval′ov, 1931, p. 45). The second edition of the book presented a different idea: "Very often the vocative case has the form of the nominative, as in Kholmshchyna land" (Hruns′kyǐ & Koval′ov, 1931, p. 45). This quotation is also interesting because the editor or the proof-reader of the book seemingly missed the only usage of the term "vocative case", which proves that the manuscript of the book had been changed.

The aforementioned feature is closely related to another important characteristic, which is the manner in which addressing was expressed. Authors of grammar books of the previous period interpreted nominative case usage for address as a consequence of the influence of the Russian language. Most Soviet grammarians claimed that both the vocative and nominative are the two morphological ways to express this function. The claim that Ukrainian uses nominative specialisation to express address needs argumentation, verification, and substantiation by means of considerable sampling. Nevertheless, it was always presented as an irrefutable fact, illustrated

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[9] After Poland was occupied in 1939 and its territories were split between the Soviet Union and Germany, L′viv fell under Soviet rule. The Soviets remained in L′viv until June 1941.

with some examples taken from fiction. We can observe some peculiarities in the formulation of this statement:

1. The authors used different modalities when they verbalised the morphological expression of addressing. Mostly, they were categorical, such as (5), (6), (7).

(5)   In the modern language address is expressed with a nominative form of the noun more and more often (Ivchenko, 1960, p. 529)

(6)   The address in the Ukrainian language functions in two morphological variations: nominative and vocative (vocative form) (Bilodid, 1972, p. 225)

(7)   It is expressed by a noun (or its equivalent, a substantivized part of speech) in a vocative form (less often in a nominative case form) and is pronounced with specific exclamatory intonation" (Vykhovanets′ et al., 1982, p. 190)

2. Sometimes these claims were more ambiguous and verbalised by means of modal words expressing doubt. These instances were more pronounced when the authors' modality ranged within one statement about the vocative and nominatives. Such wording presented a greater degree of assuredness when it dealt with the vocative used for address (9), (10). While referring to its expression by means of the nominative case, grammarians were less confident.

(8)   Most often address is expressed by nouns in vocative forms: it may also be expressed by some nominative case forms" (Kulyk, 1948, p. 284)

(9)   Address is most often expressed by nouns in vocative forms although it may also be expressed by nominative case forms" (Dolenko et al., 1974, p. 320)

3. Pragmatic colouring could be also observed if quantifying words (adverbs such as *often*, *rarely*, *also*, etc.) were utilised as in (5), (7), (8), (9), (10).

(10)   nominative case forms are also used in address" (Kahanovych & Shevel′ov, 1935a, p. 21)

Authors of textbooks sometimes omitted the fact that vocative forms were peculiar to (animated) personal names due to their function and that they coincided with the relevant nominative case form of the noun in the plural when they spoke about the means of expressing address. This omission allowed them to design example sets in which address was explicated by a plural noun or inanimate person's name and illustrated their claims about the natural usage of the nominative case in Ukrainian address. Examples (Ivchenko, 1960, p. 529) here:

(11)   *Oi, Dnipro, Dnipro, sered temnykh tuch nad toboiu mchat′ zhuravli* [Oh, the Dnipro, Dniro, cranes dash above you among dark clouds] (Dolmatovskii).[10]

(12)   *O sontse iaskrave, o sontse iasne, u nashii kraiini zhyttia vesniane!* [Oh, bright sun, oh, clear sun, our country's life is like spring] (Tychyna).

(13)   *Pohano, bratchyky, bez dila v sviti zhyty* [Brothers, it is bad to live with nothing to do] (Hlibov).

(14)   *Moskva nasha liuba, Moskva nasha slavna, krasoiu ty duzha, dilamy preslavna!* [Moscow, our loved one', Moscow, our glorious one, you are mighty beautiful, your deeds are mightily great!] (Tychyna)

There is also controversy of a different kind when the selection of illustrative examples is scrutinised. For instance, *A Course of Modern Standard Ukrainian*, edited by Leonid Bulakhovs′kyi, has

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[10] It is necessary to note that the nominative case in this address could have been preconditioned by the fact that this is not an original Ukrainian text, but a translation from the Russian language (see Cybriwsky, 2018, pp. 80–82) which has lost its morphological form of the vocative.

no information on address as a syntactic category in its sections about detached sentence components, nor does it include information about words and word groups which are grammatically unrelated to the sentence (see Bulakhovs′kyĭ, 1951b, pp. 127–134). Nevertheless, in the section on punctuation there are rules about the use of commas (Bulakhovs′kyĭ, 1951b, p. 385) and exclamation marks (Bulakhovs′kyĭ, 1951b, p. 366) when addressing. The examples provided have sentences with the vocative in address; some of them indicate personified notions. This means that the examples with the vocative could have naturally had nominative forms instead: *vitre buinyi* [...], *liubyma zemle, Ukraiino* [mighty wind [...], Ukraine, dear land] (Bulakhovs′kyĭ, 1951b, pp. 366–367); *zore moia vechirniaia, moia nemudra pisne, moia otchyzno myla* [my evening star, my unwise song, my dear motherland] (Bulakhovs′kyĭ, 1951b, pp. 385–386). Only one example out of the eighteen provided for these two rules has a nominative case address: *tovarysh Krechet* [comrade Krechet] (Bulakhovs′kyĭ, 1951b, p. 386). In fact, this list of examples also has one case of the address expressed by means of an adjective (*Nenavydnyi!* [Hateful!]) and three examples with addresses expressed by means of plural nouns (*druzhyny*, *braty moii*, *divchatka* [wives, my brothers, lasses]). Still, the forms of plural adjectival and nominal forms in the vocative and nominative cases coincide, which is why the authors' argumentation in favour of the vocative case displacement by the nominative is quite insubstantial. Actual examples selected by the grammarians disprove their previous statement about the "very common" usage of the nominative case in the function of the vocative. The co-authored *Grammar of the Ukrainian Language* (1982) mentioned that address could be expressed by nominal case forms, but the examples provided had only the vocative (Vykhovanets′ et al., 1982, p. 191). The latter also included an example with substantivized adjectives (*malesen′kyi* [small one]), but it has been already mentioned that the attributive forms of the nominative and vocative cases are homonymic.

3.5   The Qualification of the Vocative in Modern Grammar Books

As mentioned earlier, 1991 was the year when another reorientation took place in relation to the interpretation of the vocative in Ukrainian grammar books. After Ukrainian independence was proclaimed, a new stage of scientific development began, with no censorship or any official restrictions on canonical theories. The ban on the works of repressed scholars was removed and foreign scientists became freely accessible. It is necessary to highlight that some easing was already obvious in the last years of the existence of the USSR, which resulted in the substitution of the term "vocative form" (*klychna forma*) into "vocative case" (*klychnyi vidminok*) when another official edition of the *Ukrainian Spelling Rules* was published in 1990. All higher education grammar books which were published after 1991 qualify the vocative as a grammatical case.

Apart from these works, a number of monographs and numerous articles have been devoted to the grammatical status of the vocative and the peculiarities of its usage. We did not analyse these papers as they represent purely linguistic discourse, rather than language educational discourse.[11] At the same time, it is important to underline that some of them have become a theoretical foundation for qualifying the vocative as a grammatical case in modern grammar books for universities. We are referring in particular to the monograph *The Case System of the Ukrainian Language* by Ivan Vykhovanets′ (published in late Soviet times, in 1987) and Mar′ian Skab's works (Skab, 2002, 2007, etc.).

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[11] The authors are well aware that purely linguistic and language educational discourses cannot be treated in isolation. Scientific theories are shaped and developed as well as criticised and denied within purely linguistic discourse. Only then do most reasonable, grounded and established concepts become incorporated into language education. However, these discourse types have differences at the levels of both conceptual content and the communicative practices of their representation. Our article cannot cover purely linguistic and language educational discourses in a parallel way. We plan to discuss interpretations of the vocative and its language representation by Soviet and post-Soviet monographs and scientific articles in upcoming papers.

As for the conceptual level of the current language education discourse implementation, all modern grammar books authors are unanimous in recognising the grammatical case status of the vocative and its seventh position in the case paradigm[12] (Bezpoiasko et al., 1993, p. 21; Horpynych, 2004, p. 69; Hryshchenko, 1997, p. 344; Lavrinetsʹ et al., 2019, p. 206; Moĭsiienko, 2013, p. 268; Pliushch, 1994, p. 205; Ponomariv, 1997, p. 121; Venzhynovych, 2008, p. 173; Vykhovanetsʹ & Horodensʹka, 2004, p. 63; Vykhovanetsʹ et al., 2017, p. 90). The term "vocative form" is preferred only in a single book on syntax (Slynʹko et al., 1994, pp. 408–411). Also, there are no notes on any peculiar status or "deficiencies" of this case. Some scholars mention that the vocative was removed from the list of cases under the Soviets (Lavrinetsʹ et al., 2019, p. 206). Occasionally, these arguments are excessively emotional when compared to a more typical academic style of writing: "There was a period when the Ukrainian language needed to be similar to the Russian language in every single aspect. So having an additional grammatical case in comparison to the Russian language was considered as some kind of unattainable luxury" (Ponomariv, 1997, p. 292).

Unlike the grammars of the previous period, modern course books provide the argumentation for the case status of the vocative when they deal with the description of Ukrainian morphology (Lavrinetsʹ et al., 2019, p. 206; Vykhovanetsʹ & Horodensʹka, 2004, p. 63; Vykhovanetsʹ et al., 2017, p. 90). Even those scholars who referred to the vocative as "a vocative form" in their books of the Soviet period have switched their opinion, and now they strongly support its case status and emphasise that the vocative's function is characteristic of proper Ukrainian (Hryshchenko, 1997, p. 344; Pliushch, 1994, p. 205). Clearly, this issue has been so sensitive for Ukrainian linguists that they even highlight the case status of the vocative while writing on syntax and dwelling on the means of expressing address (see Ponomariv, 1997, pp. 292–293; Shulʹzhuk, 2004, p. 173).

The analysis of the means of expressing address delivered by modern grammarians shows that there are two types of tactics in dealing with the issue. The first one presupposes that only one type of means (vocative) is discussed; such authors fail to mention that the current-day lingual practice provides evidences for the nominative case being used in this syntactic function.[13] Respective claims can even be categorical in some course books: e.g. (15), (16). Another kind of wording provides for less categorical implications: e.g. (17). Here the attribute "natural" implies that other forms of addressing are less "natural". The same analogy could be established for statements with quantifying words: e.g. (18). Here, the quantifying words "most often" imply that other cases are rarely used in similar functions. Such implications let the scholars ignore the real practices of speakers (who often appeal by means of nominative case forms) which are not supported by the course books authors without obviously negating the current lingual situation. Generally, these tactics contradict the descriptivist principles which are fundamental for the description of modern language grammars.

(15)   Vocative syntaxemes of the modern Ukrainian language are expressed by the vocative case (Vykhovanetsʹ, 1993, p. 268);

(16)   Address is expressed by the vocative case in its singular or plural form (Pliushch, 1994, p. 351).

(17)   Vocative (vocative case) is a natural address form in the Ukrainian language (Shulʹzhuk, 2004, p. 173).

(18)   Addresses are most often expressed in vocative case which has the same forms with nominative case for plural nouns and all neutral nouns' (Bevzenko et al., 2005, p. 131).

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[12] Modern language education discourse still cannot be considered univocal, as the interpretations of some other grammatical categories (such as voice and tense of verbs or the issue of animate/inanimate nouns) vary greatly between different linguists.

[13] In terms of "standard/non-standard" speech practice, the analysis of the reasons for this phenomenon and its evaluation require specific research.

The other tactics presuppose that linguists dwell on both ways to express address in the modern Ukrainian language and emphasise that the usage of the nominative case in this function is non-standard (Dudyk & Prokopchuk, 2010, p. 237; Moǐsiienko, 2013, p. 151; Ponomariv, 1997, p. 293; A. P. Zahnitko, 2001, p. 268). This is a combination of descriptive and prescriptive principles in modern language education discourse. These tactics provide for Russian–Ukrainian interference being mentioned in course books, which is characteristic of the 1900–1933 language education discourse. Some scholars explain that the nominative case functioning as address is the result of "several-centuries-long influence of the Russian language" (Dudyk & Prokopchuk, 2010, p. 237).

Modern language education discourse also refers to the linguistic treatises of the 1920s—1930s, which were banned in Soviet times but have now become a reputable source of information. For example, Anatolii Moisiienko refers to Ivan Ohiienko's work and emphasises that the vocative case is a standard expression of address in modern Ukrainian (Moǐsiienko, 2013, p. 151). When Olena Lavrinets′, Kateryna Symonova, and Iryna Iaroshevych state the semi-componential structure of the nominal case paradigm they appeal treatises by Ievhen Tymchenko and Ahatanhel Kryms′kyi among others (Lavrinets′ et al., 2019, p. 206).

4   Conclusions

Analysis of the practices used to describe the grammatical status and syntactic functions of the vocative in Ukrainian grammars from the 16th to the 21st centuries has revealed variously ranging trends in different historical periods, which preconditioned the establishment of a number of stages in how this category was treated and interpreted.

Despite the fact that the grammatical descriptions of the 16th–18th centuries present some hesitations concerning the number and functions of grammatical cases, all of them qualified the vocative as a fully-fledged member of the nominal inflection paradigm. Until the early 20th century, Ukrainian grammar books were regularly published in the Ukrainian territories under Austro–Hungarian rule. All of them described seven cases, with the vocative taking fifth position within this system. A substantial number of authors used Meletii Smotryts′kyi's terminology, although some followed the Czech tradition of numbering the cases. The syntactic specialisation of the vocative within the sentence was then seen as appellative. Furthermore, some of the first comments on the nominative case used as a possible form of address for stylistic purposes occurred at this time. From the early 20th century to 1933, two approaches were applied to interpreting the vocative's grammatical status: Either 1) as a fully-fledged component of the case system, or 2) a "fake" case, a special form in the nominal inflection paradigm. As a result, two terms were respectively used ("vocative case" and "vocative form"). Additionally, a number of grammar books included the author's own terminology to designate this category. Address by means of the vocative case was interpreted as a language norm by grammarians; address by means of the nominative case was treated as a violation of this norm, influenced by Russian language practice.

The most important feature of Soviet Ukrainian grammar books (1933–1991) is the broken tradition. The majority of the relevant publications belonging to the previous period were forbidden and removed from circulation. New systemic descriptions of the Ukrainian grammatical system started appearing in the late 1940s and early 1950s. The theory of the six-component case system became canonised and proclaimed the vocative a "non-case", the so-called "vocative form". Up to the mid-1980s, grammar books lacked any mention of the vocative as a fully-fledged grammatical case. However, some scientific monographs (within purely linguistic discourse) have represented this view. The language norms related to address and postulated in grammar books were also dramatically different from the codification in earlier papers. Given the fact that the vocative in the Russian language decayed and its functions were retained by nominatives, the unified concept of the vocative's "non-case" status and its variation represented efforts to scientifically substantiate some morphological similarities between Russian and Ukrainian. It was only logical for the books of those times to remove any techniques for grammatical description to compare Russian

and Ukrainian language phenomena, as well as Russian–Ukrainian interference, highlighting the issue of the social status of Ukrainian in the USSR.

The disagreement between such a concept of the vocative and certain linguists' scholarly views and Ukrainian grammatical tradition may indicate that some grammar books of the period were flawed and violated logical chains in the structure and delivery of information. Sometimes the author's characterisations of the vocative contradicted their arguments for its "non-case" status. The discrepancy between the postulated language norms and actual language practice could be proved by the fact that while authors had to claim some dual way to express address (the vocative form and nominative case), they still had to illustrate it with dubious modality sentences. Sometimes, they even provided examples with only the vocative used to address.

The authors of modern grammar books (since 1991) are unanimous in defining the vocative's case status and substantiate their opinion and interpretation (which is sometimes overtly emotional) in the wake of linguistic treatises and course books of the 1920s–1930s whose authors' ideas are still considered sufficiently authoritative. The tactics employed to illustrate morphological means of address expression fall into two groups and manifest the following trends: 1) to violate descriptive principles and ignore current language practices which often include address expressed by means of the nominative case; 2) to combine descriptive and prescriptive principles by delivering information on both means of address expression and commenting on one of them as non-standard. The emotions presented by some authors in their substantiation of the status of the vocative case, as well as in their failure to mention the variable morphological expression of address in modern language practices, could testify to their traumatic experience in the externally regulated scholarly life, their personal anxiety caused by the artificially undermined language norms of the Soviet period, and the wish to return to the *usus* of pre-Soviet conditions.

Analysis of the means of expressing the vocative, from the time when the first grammatical treatises appeared until today, gives grounds to presuppose that descriptive tactics, which have been established for every historical stage, can be used to characterise Ukrainian language education discourse in general. This information can be used to establish the trajectory of its development, while clearing the margins of the respective colonial and post-colonial periods. Nevertheless, this suggestion still requires additional verification involving more expansive illustrative material and providing the outline of further research.

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