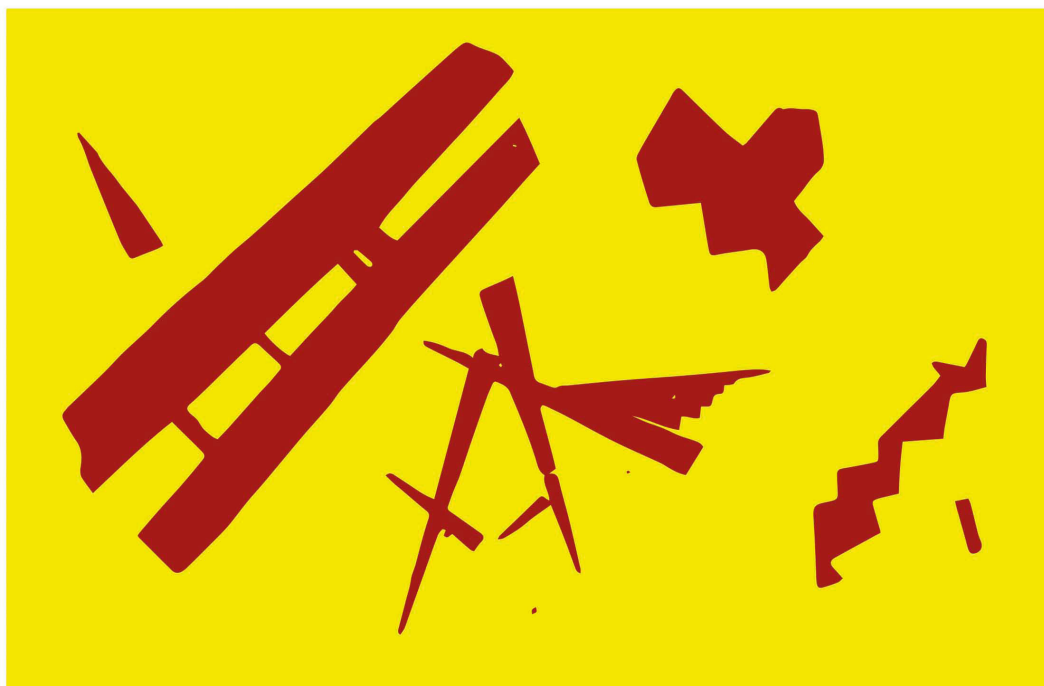


Juridisko un Sociālo Zinātņu  
un Sociālo Zinātņu **BALTIJAS ŽURNĀLS**

Juridisko un Sociālo Zinātņu  
**BALTIJAS ŽURNĀLS**

Baltic Journal  
of Legal and Social  
Sciences



Rīga:

Baltijas Starptautiskā Akadēmija

ISSN 2592-8813

 IZDEVNIECĪBA  
**BALTIJA**  
PUBLISHING

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**Baltic Journal of Legal and Social Sciences** is included in databases:

ERIH+

Index Copernicus

Number 1. Riga, Latvia : "Baltija Publishing", 2024, 264 pages.

Baltic International Academy is a co-publisher of this periodical.

Printed and bound in Riga by LLC Publishing House "Baltija Publishing".

Journal is available: [www.baltijapublishing.lv/index.php/bjls](http://www.baltijapublishing.lv/index.php/bjls)

DOI: <https://doi.org/10.30525/2592-8813>

Type of publication from the application:

**Journal-Digital-Online**

**Issue ISSN 2592-8813**

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## THEORY AND PRACTICES OF LAW

DOI <https://doi.org/10.30525/2592-8813-2024-1-1>

### CORRUPTION AND SHADOW ECONOMY AS DETERMINING FACTORS OF INFLUENCE ON ECONOMIC SECURITY OF UKRAINE

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**Abstract.** In today's world, we are witnessing the aggravation of new global problems of our time. This period is marked by the growth of crisis phenomena, which stimulate states of different levels of development to form integration groups. The main goal of these associations is to overcome barriers to the free movement of goods, capital and labor. The desire for integration becomes an integral part of the optimal model of involvement of the domestic economy in world processes and a necessary prerequisite for overcoming systemic crisis phenomena.

Despite all efforts, widespread corruption in all sectors of the economy and spheres of public administration, a high level of the shadow economy create countless obstacles to the implementation of the necessary reforms. These problems significantly affect the investment attractiveness of Ukraine, which slows down the process and reduces the effectiveness of reforms, which often acquire only a formal character. In addition to the above,

corruption today is part of the shadow economy, which poses a serious threat to the security of the entire country. Corruption and the shadow economy are a new serious challenge for modern Ukraine, because by casting a shadow on the country's prospects for sustainable economic development, it devalues all attempts to develop successfully and freely.

Today, the listed phenomena determine the economic landscape, violating the principles of effective management and undermining the foundations of economic security. Analysis of the impact of corruption and the shadow economy becomes a key aspect for understanding the current situation and developing strategies to overcome these challenges.

**Key words:** corruption, shadow economy, national security, economic security.

**Introduction.** Against the background of global economic transformations, Ukraine faces the need not only to attract investments and develop new industries, but also to solve systemic problems in the field of corruption and the shadow economy. The relevance of this topic lies in the fact that they not only inhibit economic growth, but also generate social inequalities and undermine trust in state institutions. In this context, it is important to consider corruption and the shadow economy as key aspects of the country's economic security.

**Main part.** The following Ukrainian and foreign scientists were engaged in the study of the phenomenon itself and the analysis of the level of corruption and shadowing of the domestic economy in order to identify their impact on economic Ukraine: Baranovska T. (Baranovska, 2023), Butuzov V. (Butuzov, 2023), Dyka O. (Dyka, 2023), Dykiy A. (Dykiy, 2022, 2023), Hrycyszen D. (Hrycyszen, 2023), Suprunova I. (Suprunova, 2023), Svirko S. (Svirko, 2022), Trosteniuk T. (Trosteniuk, 2022), Kazak O. (Kazak, 2023), Lutsenko M. and Shcherbina L. (Lutsenko, Shcherbina, 2015), Naumchuk K. (Naumchuk, 2023), Savytskyi O. (Savytskyi, 2017) and others. However, the problem of the relationship between corruption and the spread of the country's shadow economy remains unresolved. That is why this issue requires further research.

The purpose of this article is to consider the problem of corruption and the shadow economy in Ukraine with the aim of identifying their decisive influence on economic security. It is planned to investigate the main causes and conditions contributing to the spread of these phenomena, to analyze their consequences for economic development and international cooperation. In particular, the article will consider possible ways to overcome corruption and the shadow economy in order to contribute to strengthening the economic security of Ukraine and creating a favorable environment for sustainable development.

A characteristic feature of the modern world economy in the process of globalization and integration is the high concentration of capital. In the context of improving the quantity and quality of transnational corporations and finance, there is an erasure of group and economic boundaries between countries and the accelerated formation of a global market with general competitiveness. In such processes, the low level of corruption and fast rates of economic growth are a competitive advantage that will facilitate the implementation of all necessary reforms and changes. These factors confirm that the lag in the development of the economy from the global and European macroeconomic indicators, as well as the shadowing of the economy and the strengthening of corruption phenomena in various sectors and at various levels of state administration are a significant threat to the economic security of the country.

Today, the phenomenon of corruption is complex and multifaceted, arising from the abuse of power, influence or authority for personal gain or illegal enrichment. In the context of economic security, corruption becomes a threat because it can violate the fairness of market conditions, interfere with the competitive environment and distort decision-making processes. This may include: bribery, bribery, abuse of office, bad management and other practices that violate the law and ethical principles. Such systemic and widespread corruption affects various spheres of society, including the economy, creating challenges for sustainable development and ensuring the country's economic stability.



The current process of reforms in Ukraine, which we have been observing in recent years, is aimed at objectively confronting destructive threats within the framework of the chosen process of European integration. However, there are a number of negative factors that not only affect the investment attractiveness of our country, but also make all positive changes in the economy a mere formality, and the effectiveness of reforms is lost. This is facilitated by: significant corruption and a high level of shadowing of the Ukrainian economy. Therefore, it is quite important to consider the types of corruption, which makes it possible to better understand the complexity of this phenomenon and identify effective methods of overcoming it. Here is a detailed analysis of the types of corruption:

1. Big corruption is characterized by the benefit of not a large number of individuals, but the damage is felt by the whole society. Its impact on the economy is significant and can lead to a loss of trust in the authorities, disrupt the business environment, inhibit strategic decision-making, which affects business efficiency and the investment climate.

2. Petty bribery involves small amounts of money exchanged for small benefits or favors. This type of corruption can create inequalities and deficiencies in the system of providing services and benefits, disrupting equality and reducing the effectiveness of civil society.

3. Clientelism relies on personal or family connections to obtain benefits and services. This type of corruption can create injustices and shifts in the distribution of resources, hindering the transparent and competitive development of the economy

By distinguishing these varieties, it is possible to study their specific mechanisms of action and identify areas for reforms and improvements aimed at combating corruption in all its manifestations.

Grand corruption is characterized by receiving large amounts of money and influential positions, and may include the conclusion of opaque deals, bribes, and the use of public power for personal gain. The reduction of corruption on a large scale can be achieved by strengthening the structural control of anti-corruption bodies, improving the reporting system and making it mandatory to disclose information about the property of officials (UNDP, 2016).

A small bribe can lead to the substitution of equality and justice, violating the principles of democracy and the rule of law. The reduction of petty corruption can be achieved through the implementation of electronic service systems and e-document circulation (accessible and transparent for all), which minimizes the contacts of visitors with officials.

Clientelism can lead to non-transparent decisions in the provision of services and benefits, violating the principles of equality and justice. The introduction of transparent and objective criteria for receiving services or benefits, the development of public control mechanisms and the support of independent non-profit organizations will contribute to solving this problem (Johnson, Kaufmann, & Zoido-Lobaton, 1998).

The government's attempts to overcome the systemic crisis phenomena in the economy through reforming various spheres and measures to attract foreign investment are facing difficulties due to the difficult political situation and negative investment climate. These problems are largely due to the high level of corruption at all levels of state administration and the large level of shadowing of the domestic economy (which was mentioned above). To assess the level of corruption in Ukraine and compare it with other countries, various international indices are used, in particular the Corruption Perceptions Index (CPI) from Transparency International. These indices make it possible to obtain an objective picture of corruption practices and determine the position of each country in the world ranking (World Bank, 2011).

Analysis of the dynamics of the level of corruption makes it possible to observe changes over the years and determine the effectiveness of anti-corruption measures. Continuous improvement of anti-corruption reform strategies is a key element in combating this phenomenon. In addition, the analysis of factors affecting the level of corruption, such as political stability, the effectiveness of justice and the development of civil society, can help in identifying the main causes of the spread of corruption and determining the strategic directions of reforms (Campos & Root, 1996).

Given that today Ukraine received 33 points out of a possible 100, we still need reforms, which include: strengthening anti-corruption bodies, improving the system of data collection and analysis, improving the judicial system and supporting civil society. An important stage is also the monitoring and evaluation of the effectiveness of the implemented reforms for the continuous improvement of the situation in the country (Transperensi Interneshnl Ukraina). In a state where a high level of corruption prevails, the shadow economy precedes reforms, which in turn demonstrates the trust of business in the state, the acceptability of the level of taxation, the availability of loans, and the effectiveness of economic incentives for official employment. The shadow economy describes illegal, incompletely reflected in official statistics economic operations and spheres of activity. This includes all types of illegal businesses, untaxed and undeclared transactions, as well as tax avoidance and other economic activities that evade official regulation and taxation.

The shadow economy includes a variety of illegal activities, such as: smuggling, illegal drug trade, export of capital and other violations of the law, which leads to:

- tax evasion. Many subjects of the shadow economy avoid paying taxes by conducting operations without official registration and declaration of profit;

- low level of social protection. Work in the shadow sector is often accompanied by a lack of social guarantees and protection of workers' rights.

For each sector of the economy, this threatens the occurrence of such consequences as:

1. Decrease in competitiveness. Corruption leads to unfair competition, where businesses that provide an unfair advantage or engage in other corrupt practices can gain an unfair advantage over honest businesses. A decrease in the competitiveness of fair companies leads to the limitation of their development and loss of market share.

2. Increasing the cost of production. Unfair rules of the game make it impossible for honest enterprises to conduct business according to market conditions. High corruption costs increase the risks and reduce the profitability of the enterprise, which can affect its sustainability and efficiency.

3. Deterioration of the investment climate. Corruption creates uncertainty and risks for investors, as it can affect the stability of the business environment and the reliability of concluded deals. Investors may refrain from investing in a country with a high level of corruption due to fear of losses and uncertainty about compliance with legal agreements.

4. Decrease in trust in the authorities. Corruption schemes can violate the trust of entrepreneurs in government institutions and bodies that reported for law enforcement and law enforcement. A decrease in trust can lead to a loss of perception of the legal system as independent and fair, which negatively affects the decisions of the business community.

5. The threat of sustainable development. Corruption leads to irrational use of resources and loss of business efficiency, which threatens the sustainable development of the business environment.

A business environment polluted by corruption becomes an obstacle to sustainable economic growth and social progress. The fight against corruption is important not only from an ethical point of view, but also to ensure a healthy and stable economic environment that attracts investment and promotes sustainable development. All these consequences force companies, despite everything, to transfer their business to the shadow segment, where cases are resolved many times faster and easier, but no one thinks about the consequences in the not-so-distant future. The shadow economy can lead to serious losses of financial resources for the country, as not only taxes are evaded, but also various rules and standards of economic functioning are violated (Shleifer & Vishny, 1993). This negatively affects the size of economic growth, social programs and the investment climate. Also, the shadow economy can generate systemic problems, such as the growth of corruption and the deterioration of competitiveness. Combating this phenomenon is important for ensuring sustainable economic development and optimizing the use of financial resources.

Estimating the size of the shadow economy can be a difficult task due to its nature of illegal and incompletely measured transactions. Assessment methods may include analyzing the amount of unofficial capital outflows, determining the difference between actual and official money circulation, and examining areas that are often in the shadow zone, such as the illegal labor market.

The shadow economy leads to non-payment of taxes that should be paid by law. This creates large losses for the budget, reducing its revenues and ability to finance social and infrastructure programs (Johnson, Kaufmann, & Zoido-Lobaton, 1998).

A decrease in budget revenues due to the shadow economy can limit the financing of social programs such as health care, education and social support. This can negatively affect the quality of life of citizens and the level of social justice.

The shadow economy limits opportunities for real economic development, as the government cannot fully take into account all economic processes and loses the ability to effectively plan and regulate economic activity (Shleifer & Vishny, 1993).

Improving the tax control system, implementing effective control mechanisms for financial transactions, as well as sanctions for violating the rules can be attempts by the authorities to reduce the size and influence of the shadow economy.

Combating this phenomenon requires a comprehensive approach, including tax reforms, improving the financial control system and creating favorable conditions for legal economic activity (Klitgaard, 1988).

The lack of modern electronic systems that can automatically monitor and analyze financial transactions makes it difficult to detect and control the shadow economy. The lack of electronic monitoring contributes to illegal and undeclared transactions, increasing the risk of loss of financial resources and violations of legislation.

The lack of clear and strict regulatory acts that regulate financial transactions and ensure their control can contribute to the expansion of the shadow economy (World Bank, 2011).

Weak legal regulation creates space for the use of legal and financial cells, which complicates the fight against corruption and illegal transactions. The lack of effective international cooperation and exchange of information between countries in the field of financial control can create space for international money laundering and other financial violations. Inefficient cooperation limits the ability to identify and stop cross-border financial transactions, which can have a large impact on the economy (Rose-Ackerman, 1999).

Insufficient transparency in the banking system, including the lack of an adequate exchange control system and disclosure of the beneficiaries of financial transactions, creates favorable conditions for money laundering and other shady practices.

The low level of transparency in the banking system ensures insufficient openness of financial transactions, which makes it difficult to identify and track shadow transactions.

The lack of effective audit control and independent mechanisms for evaluating financial transactions can allow the subjects of the shadow economy to avoid responsibility.

Insufficient auditing creates conditions for detection and prevention of financial violations, which can lead to significant losses for the budget and social programs.

Solving the above-mentioned problems requires systemic reforms in the field of financial control, improvement of legislation and strengthening of international cooperation to ensure effective detection and prevention of shadow economic operations.

The steps are aimed at creating a more effective system of financial control and combating the shadow economy, ensuring the detection and prevention of financial violations, as well as improving the general economic climate of the country:

1. Implementation of electronic monitoring systems:

- Introduction of modern electronic systems that automatically monitor and analyze financial transactions, which allows for effective detection of illegal and undeclared transactions.

2. Elimination of legal gaps:

– Carrying out a thorough analysis and improvement of the legislation regulating financial transactions in order to eliminate misunderstandings and avoid illegal actions.

3. Strengthening of international cooperation:

– Strengthening cooperation between countries in the field of information exchange and joint fight against the cross-border shadow economy. Signing and implementation of international agreements on combating money laundering and financial crime.

4. Ensuring transparency in the banking system:

– Introduction of mechanisms to increase the transparency of the banking system, including mandatory disclosure of beneficiaries of financial transactions and improvement of currency control systems.

5. Strengthening of audit control:

– Introduction of mandatory and independent audit checks for all financial operations of enterprises, which helps to detect and prevent financial violations.

6. Educational campaigns and public involvement:

– Carrying out educational campaigns to raise public awareness of the negative consequences of the shadow economy and create mechanisms to involve the public in monitoring financial transactions.

7. Introduction of modern blockchain technologies:

– Use of blockchain technologies to ensure transparency and security of financial transactions, which will allow monitoring of transactions in real time.

In the context of modern challenges of the economy and finance, the fight against corruption and the shadow economy becomes extremely relevant to ensure the sustainable development of the country and preserve its economic security. Analysis of the influence of corruption and the shadow economy on the economic situation of Ukraine reveals problems that require careful study and systemic reforms.

**Conclusion.** We considered the definition and types of corruption, the features of the shadow economy, as well as the impact of both phenomena on the budget, social programs, and the business environment. It was found that the lack of effective control mechanisms, weak legislation and unfavorable conditions for reforms are key factors contributing to the spread of these phenomena. Proposed measures to improve financial control, strengthen legislation and international cooperation can be an important step forward in solving these problems. Initiatives regarding the introduction of modern technologies, the activation of audit control and the involvement of the public are designed to contribute to the creation of a transparent and responsible economic environment.

The general goal of solving these problems is to create a sustainable economy that works for the benefit of all layers of society, ensuring the efficient use of resources, attracting investments and improving the quality of life of citizens. Only with a comprehensive approach and implementation of the proposed recommendations can significant changes be achieved in the fight against corruption and the shadow economy, ensuring the sustainability of development and economic security of the country.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-2>

## THE CONCEPT AND LEGAL NATURE OF THE METHODS OF PROTECTION IN THE ADMINISTRATIVE JUDICIARY OF UKRAINE

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**Abstract.** The article is devoted to the problems of the legal nature of the methods of judicial protection in the administrative proceedings of Ukraine. Attention is drawn to the fact that this issue is insufficiently covered in science. The article indicates that jurisprudence theories have developed different approaches to the interpretation of the meaning of the concept of "methods of protection of rights and interests". The main attention in science is paid to this concept by civil law specialists, and this is explained by the fact that scientific research in this field has been developing for a long time. The author draws attention not to the fact that methods of judicial protection in legal science are considered as a type of demand, as a type of coercion and as an action of the subject of protection. In the article, it is proposed to understand the method of protection in administrative proceedings as a substantive legal requirement, which is provided for in the law, and which ensures the renewal of the violated right or interest of a person in public legal relations. It is substantiated that the methods of protection are a specific material and legal requirement, which is aimed at the protection of the right. This requirement is a final action (act) on the way to removing obstacles to the exercise of a subjective right or interest, termination of an offense and removal of obstacles to the exercise of a right (interest). The article proves that the methods of protecting the rights, freedoms, and interests of individuals when challenging the decisions of subjects of authority have the following features: they represent a procedural and legal requirement to the court enshrined in the law; are applied on the basis of the law; the basis of application is a violation of the right, freedom or interest of the person applying them; aimed at restoring the violated right, freedom or interest; conditioned by the object of protection represented by the decision of the subject of power.

**Key words:** administrative proceedings, administrative court, method of judicial protection, judicial protection, subject of authority, decision of the subject of authority.

**Introduction.** Article 5 of the Administrative Judicial Code of Ukraine defines the right of every person to apply to an administrative court for protection in cases where he believes that the actions or inaction of a subject of authority violate his rights, freedoms or legitimate interests. Part 1 of this article defines the methods of protection that a person can choose. In Art. 245 of the Administrative Judicial Code of Ukraine contains the methods of protection used by the court when considering a public legal dispute. The means of protection are important, because the opportunity to use them contributes to the efficiency of justice and the achievement of the tasks of administrative proceedings. The means of protection are certain actions of a person and the court, which are provided for by law and are directed directly to the protection of rights. They represent material and legal requirements, which, firstly, are aimed at eliminating obstacles in the exercise of a person's rights in the public legal sphere, and secondly, at stopping the offense and restoring the legal position of the person that existed before its violation.

Along with this, one cannot fail to pay attention to the fact that the legal nature of the methods of protection in administrative proceedings is not properly investigated, which in turn complicates law enforcement.

**The goal of the study.** The purpose of the study is to clarify the essence of the concept of methods of protection in administrative proceedings, their content, properties. For this, it is proposed to solve

the following tasks. To determine the place of the methods of protection in administrative proceedings in the system of measures to implement the right to judicial protection, to clarify the meaning of the concept of methods of judicial protection in administrative proceedings with such combined categories as the form of protection and the means of protection, to identify the properties inherent in the methods of judicial protection in administrative proceedings judiciary of Ukraine.

**Material and research methods.** The following research methods were used in the work, as a systemic and structural one, which allowed to investigate the methods of judicial protection in administrative proceedings, as a systemic category, in the mechanism of realization of the right to judicial protection, and in the structure of its elements. Juornal-legal allowed to formulate the concept of the method of judicial protection, the method of analysis and synthesis allowed to study the scientific positions of scientists whose works were devoted to the methods of judicial protection.

The author of the article drew attention to the fact that in legal science the methods of judicial protection were mainly studied by specialists in the theory of law and civil procedure, in particular O.P. Kulynych, Yu.D. Prytykiou, G.V. Churpita, T.M. Podlubna and others. In the science of administrative law, methods of judicial protection were mostly covered on the pages of textbooks and fragmentarily, in the context of other monographic studies with broader issues by such scientists as Ya.O. Bernazyukom, T.O. Kolomoets, O.V. Kuzmenko, T.P. Minkou, O.P. Ryabchenko and others. Along with this, the question of the legal nature of the methods of judicial protection in administrative proceedings has not been sufficiently investigated.

**Results and discussion.** In the theory of jurisprudence, different approaches to the interpretation of the meaning of the concept of "method of protection of rights and interests" have developed. The main attention in science is paid to this concept by civil law specialists, and this is explained by the fact that scientific research in this field has been developing for a long time. However, these scientific assets can also be applied in the field of solving public legal disputes, since it is about the general principles of the functioning of the state apparatus and the mechanism of legal regulation of the protection of the rights and interests of individuals, which was created in our country.

It should also be noted that there is no official definition of "methods of protection" in modern national legislation. For example, the Administrative Judicial Code of Ukraine provides only a general list of ways to protect the rights and interests of individuals (Kodeks administratyvnoho sudochynstva Ukraini, 2017). Therefore, it is no coincidence that there is a diversity of views on the studied concept in the scientific literature.

Thus, protection methods are considered as a type of requirement. The means of protection in such a case are presented as material and legal requirements provided for in the law, and the application of which ensures the renewal of violated rights or interests.

The means of protection are also considered as a type of coercion, namely, as material and legal measures of a coercive nature enshrined in the law, which allow to restore the violated right or interest, to exert influence on the person who violated it and, in the cases provided for by the law, to apply measures of responsibility ( for example, in the form of damages). So, it can be noted that the method of protection in this case is connected with the principles of law and order, as a result of the normal functioning of the state system of managing social relations. Obviously, in this context of understanding the methods of protection, the term "coercion" includes a broad concept that involves the influence of the state on a person through the positive influence of legal regulation. This influence can be exercised not only by actually forcing a person to act (comply with a court decision), but also by persuading him to perform certain actions (act in favor of the plaintiff).

Methods of protection in the scientific literature are also considered as an action of the subject of protection. That is, a person whose right or interest has been violated takes legal actions aimed at protecting the violated right or interest by applying to court. These actions can be of a different nature, including material and legal actions and jurisdictional measures aimed at eliminating the violation of

the right, at the termination of the violation of the right, as well as the restoration of the legal position of the person that existed before the violation. The application of a specific method of protection is the result of legal protection activities. One can agree with the last statement, but with the caveat that the application of a specific method of protection is embodied in the corresponding substantive legal requirement, which is a consequence of the actions of the person whose right or interest is violated.

Considering the methods of protection as “measures of state coercion” or as “action” of the subject whose rights or interests are violated, in our opinion, do not fully correspond to the very nature of the methods of protection of the rights, freedoms, and interests of individuals in administrative proceedings. The task of administrative proceedings is to effectively protect the rights, freedoms and interests of persons who submit their substantive and procedural claims to the court in order to protect their violated right, freedom or interest. For this purpose, persons perform the procedural actions prescribed by the Administrative Judicial Code of Ukraine (Kodeks administratyvnoho sudochynstva Ukraini, 2017). The consequence of the trial is the application by the court of certain adverse consequences to the subject of power, which are associated with the obligation to comply with the court decision and to compensate for the damage. That is, "actions" and "force" are derived concepts.

Judicial practice is ambiguous in matters of interpretation of the concepts we are studying. The analysis of the decisions of the Supreme Court shows some inconsistencies in the interpretation of the concept of the method of judicial protection. Yes, sometimes such concepts as "form" of legal protection and "methods" of legal protection are equated. For example, we can cite the Resolution in case № 140/13065/21, in which the Supreme Court notes that “...every person has the right, in accordance with the procedure established by this Code, to apply to the administrative court if he believes that the decision, action or inaction of the subject authority, its rights, freedoms or legitimate interests are violated, and ask for their protection; the protection of the violated rights, freedoms or interests of the person who appealed to the court can also be carried out by the court in any way that does not contradict the law... forms of protection, in particular, are recognition of the illegality and invalidity of a normative legal act or its individual provisions; recognition as illegal and cancellation of an individual act or its individual provisions; recognizing the actions of the subject of authority as illegal and the obligation to refrain from certain actions; recognition of the inaction of the subject of authority as illegal and the obligation to perform certain actions” (Postanova Verkhovnoho Sudu, 2023). So, we see that the forms of protection and methods of protection are identified in this resolution.

In other of its decisions, the Supreme Court stated that the protection of rights is understood as state coercive activity aimed at restoring the violated right of the subject of legal relations and ensuring the fulfillment of a legal obligation by the obligated party. The method of protection can be defined as a concentrated expression of the content (essence) of the measure of state coercion, with the help of which the desired legal result for the person whose right or interest is violated is achieved. The method of protection embodies the immediate goal that the subject of protection (plaintiff) seeks to achieve, believing that in this way the violation (or contestation) of his rights will be stopped, he compensates for the costs incurred in connection with the violation of his rights, or in other method eliminates the negative consequences of violation of his rights (Postanova Velykoyi Palaty Verkhovnoho Sudu, 2018; Postanova Verkhovnoho Sudu, 2022).

This is an example of a court decision in which the methods of protection are understood as coercive measures, with the help of which the violated rights or interests are restored. We can partially agree with this approach, because we believe that the methods of protection cannot be equated with state coercion, although we cannot fail to note that they, the methods of protection, have a certain coercive nature. Most likely, the methods of protection are material and legal measures (legal tools) of a coercive nature, the purpose of which is to stimulate the offender to behave appropriately, to prevent further violation of the subjective rights and interests of the person, as well as to restore the violated right and eliminate the negative consequences of its violation.



It can be agreed that the method of protection is related to the specific actions of a person whose rights and interests have been violated by a subject of authority (claims), is embodied in the form of the realization of the subjective right to judicial protection (the right to demand) and is transformed into a specific requirement (method of protection) to the court to protect the violated right or interest in the way provided for by law: to declare it illegal and cancel the decision; or oblige to perform certain actions; or refrain from certain actions; or recognize the actions or inaction of the subject of authority as illegal; or establish the presence or absence of competence (powers) of the subject of authority, etc.

It is also worth noting that the dispositive orientation of administrative proceedings is embodied in the ability of a person to freely, at his own discretion, choose the methods of protection provided for in the law and in the freedom to exercise the protection of his subjective right or interest. However, regardless of the dispositive nature of the choice of the method of protection of the violated right or interest, the law and judicial practice have formed certain rules for their choice – the methods of protection must be appropriate, provide effective protection and not contradict the law. Failure to comply with these requirements may be the basis for the court to conclude that the chosen method of protection is inappropriate or ineffective, or contrary to the law. Court practice follows the path of recognizing that a person can apply to an administrative court for the protection of a violated right or interest by a subject of authority, but the court may not satisfy the claim if the chosen method of protection is not provided for by law or contradicts it.

**Conclusions.** Summarizing the above, the following conclusions can be drawn.

Thus, the method of protection in administrative proceedings should be understood as a substantive legal requirement, which is provided for in the law, and which ensures the renewal of the violated right or interest of a person in public legal relations. Judicial protection of the subjective right and interest of a person against illegal decisions, actions or inaction of a subject of authority is implemented in certain ways of protection

“Form of protection”, “means of protection” and “methods of protection” are components of the concept of rights protection and integral elements of the process of removing obstacles that make it difficult or impossible to realize the subjective rights of a person and his interests. Forms of protection are an external manifestation of the jurisdictional activity of competent subjects who have the authority to directly protect the rights of individuals (jurisdictional and non-jurisdictional forms of protection). Remedies are certain actions addressed to authorized entities, and which help a person to exercise the right to protection (for example, filing a lawsuit, filing a complaint, statement or request). The means of protection are specific material and legal requirements, which are aimed at the protection of the right. This requirement is a final action (act) on the way to removing obstacles to the exercise of a subjective right or interest, termination of an offense and removal of obstacles to the exercise of a right (interest). The application of the method of protection is the result of the protection of subjective rights and interests.

Ways of protecting the rights, freedoms, and interests of individuals when challenging the decisions of subjects of authority have the following features: they represent a procedural and legal requirement to the court enshrined in the law; are applied on the basis of the law; the basis of application is a violation of the right, freedom or interest of the person applying them; aimed at restoring the violated right, freedom or interest; conditioned by the object of protection represented by the decision of the subject of power.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-3>

**EXAMPLE ASPECTS OF THE APPLICATION OF THE METHODS  
OF PROTECTION OF THE CHILD'S FAMILY RIGHTS AND INTERESTS  
BY ITS PARENTS (LEGAL REPRESENTATIVES) IN THE CONDITIONS  
OF THE LEGAL REGIME OF MARTIAL STATE**

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**Abstract.** In the scientific article, a study of applied aspects of the application of methods of protection of family rights and interests of the child in the conditions of the legal regime of martial law was carried out. In particular, the article notes that the primary assignment of the responsibilities of the legal representative of a child in an educational, social or medical institution to the head of this institution in terms of temporary removal (evacuation) of the child to safe regions or abroad was not always appropriate, given the fact that the head of the institution could evacuate on his own (due to which the relevant institution was not able to evacuate the children due to the absence of the head, or assign the relevant duties to another person). This shortcoming was eliminated after the approval of a new procedure for the temporary movement (evacuation) of children in June 2023. Also, the simplification of the procedure for the child's departure abroad unaccompanied by parents has led to the risks of the child's relatives abusing their rights and taking the child abroad without agreeing this removal with the child's parents and the intention to return the child to the state of his/her citizenship; we can recognize as a problem the inconsistency of the provisions of the Rules for crossing the state border by citizens of Ukraine and Art. 157 of the Family Code of Ukraine – the latter stipulates the need to obtain consent for the transfer of a child of any age abroad (and not one who has not reached the age of 16), besides this, it does not contain the possibility of transfer of the child by other persons; abolition of the need for notarized parental consent for a child to travel abroad unaccompanied or accompanied by one of the parents is available at the level of a subordinate legal act, but the corresponding consent is required in accordance with the Family Code of Ukraine. According to the author, the provisions of Art. 157 of the Family Code of Ukraine and clauses 2–3 of the Rules for Crossing the State Border by Citizens of Ukraine, however, it should be clarified in both cases that the simplified procedure for taking a child abroad applies only during the legal regime of martial law.

**Key words:** family rights and interests of the child, ways of protecting family rights, temporary removal (evacuation) of a child, legal representatives of the child, parents.

**Introduction.** The full-scale invasion of the Russian Federation on the territory of Ukraine in 2022 led to significant changes in the lives of every citizen of Ukraine, as well as foreigners and stateless persons who permanently lived on its territory; a significant part of their personal non-property and property rights were violated as a result of the destruction of critical and civil infrastructure, the deprivation or destruction of property, the creation of dangerous conditions for life, health and further stay in the territory of the permanent residence of these persons. Active hostilities, danger to a child's life and health, including a sudden one caused by the launch of missiles and attack drones, led to a change in priorities in the protection of children's rights – the child's right to life, which, although is not family, but must also be provided by her parents, adoptive parents, legal representatives. One of such issues related to the protection of the relevant right, as well as related to other family rights and interests, including the right to proper family upbringing, the right to be in the family, the right to development and education, the right to maintenance, became the issue of placing the child in safer conditions, taking into account that the previous place of residence of the child and his parents could

endanger the life and health of the child (if he was in a war zone, in a temporarily occupied territory or in a region where there is a missile danger).

The above made it necessary to make changes and additions to the existing legislation, which was primarily peacetime legislation and could not take into account all the difficulties in the implementation of family rights and interests under the conditions of the legal regime of martial law. The reform of the legislation regulating the protection of the family rights and interests of the child, including the peculiarities of the use of methods of protection in conditions of war by the child's parents, other legal representatives of the child, the court, guardianship and guardianship authorities, and other bodies authorized to protect family rights, was no exception. rights and interests of the child. An important issue in the context of the armed conflict and the stay of the child in conditions dangerous to the child's life and health is the question of moving the child to regions in which there are no suitable conditions (including moving the child outside the territory of Ukraine to states in which there are no circumstances of armed conflict of the conflict, primarily the member states of the European Union, the Republic of Moldova, the states of North America), as well as the issue of protecting the child's right to support in the conditions of the legal regime of martial law.

**The purpose of the article is** to determine practical aspects of the application of methods of protection of family rights and interests of the child in the conditions of the legal regime of martial law.

**Research materials and methods.** This work is based on the works of domestic scientists, current legislation, court practice, as well as materials from periodicals. The research uses methods of analysis and synthesis, comparison and generalization, as well as a number of other methods.

**Results and discussion.** One of the areas of legislation that regulates the protection of family rights and interests of the child was the definition in the legislation of the possibility of temporary placement of children left without parental care in a foster family or in a family-type orphanage. Appropriate placement is carried out by the services for children at the place of operation of the respective foster family or family-type children's home, and in the absence of a corresponding order issued by them, placement is carried out by order of the relevant military administration at the regional level. Also, during the operation of the right-wing martial law regime on the territory of Ukraine, children who are in difficult life circumstances, children who were left without parental care, orphaned children and children deprived of parental care, who live or are enrolled in institutions of various types, forms of ownership and subordination for round-the-clock stay, can be temporarily accommodated in other facilities, in which the round-the-clock stay of children is provided, in settlements where it is possible to ensure the safety of children, taking into account their age and state of health (Pro vnesennia zmin do deiakykh postanov shchodo zakhystu prav ditei, 2022).

During the last two years, changes were made to the legislation, which significantly expanded the rights of persons who have the right to protect the rights of the child as its legal representatives. In particular, on May 22, 2022, Law of Ukraine No. 2267-IX was adopted, which amended Article 30-1 of the Law of Ukraine "On the Protection of Childhood", namely, the functions of the legal representatives of the child during the period of his movement, including abroad for the purpose of evacuation, are assigned to the heads of institutions where the child was placed for a 24-hour stay, or to the head of the institution authorized an employee of this institution, or in the event that the manager is unable to perform his duties, to another person appointed by the body of guardianship and guardianship or the military administration/military-civilian administration at the location of the institution. Such persons have the right to take any actions related to the protection of the child's rights until the return of such a child to Ukraine or until his/her reunification with the family, except for the authority to perform transactions related to housing and property rights on behalf and in the interests of the child, consent to adoption and change of citizenship of the child. By the same law, the corresponding powers of legal representatives for the period of temporary relocation (evacuation) of the child were also granted to foster carers (Pro vnesennia zmin do statti 30-1 Zakonu Ukrainy, 2022). Resolution No. 580 of the

Cabinet of Ministers of Ukraine dated May 10, 2022 approved the Procedure for temporary relocation (evacuation) and provision of conditions for the stay in the territory of Ukraine, where hostilities are not taking place, or outside of Ukraine, of children and persons living or enrolled in various types of institutions, forms of ownership and subordination for round-the-clock stay, which provided that the head of the institution or an accompanying person authorized by him during the period of temporary movement (evacuation) of children is entrusted with responsibility for their life and health, duties regarding the performance of the powers of legal representatives of children (except for the execution of transactions related to housing and property rights, on behalf of and in the interests of the child, consent to the adoption of the child and change of citizenship), prevention of any attempts to violate the rights of children and persons, execution of other actions related to displacement (evacuation) of children (Pro vnesennia zmin do poriadkiv, 2022). At the same time, the primary assignment of the responsibilities of the legal representative of a child staying in an educational, social or medical institution to the head of this institution was not always appropriate, taking into account the fact that the latter could evacuate on his own (therefore, in the relevant the institution was not able to evacuate the children due to the absence of the manager, or assign the relevant duties to another person). This shortcoming was eliminated after the approval of a new procedure for the temporary transfer (evacuation) of children and persons who live or are enrolled in institutions of various types, forms of ownership and subordination for round-the-clock stay, and their return, according to which it was specified that in the event of impossibility of issuance by the head institution of the order on the temporary transfer (evacuation) of the child, including in connection with his suspension from the performance of official duties or absence, the relevant powers to determine the person responsible for the performance of the duties regarding the temporary transfer (evacuation) of the child are exercised by the oblast, Kyiv city military administration at the place of permanent location of the institution. Such a person ensures the performance of the functions of the legal representative of children in accordance with the fourth part of Article 30-1 of the Law of Ukraine "On the Protection of Childhood" (Pro tymchasove peremishchennia, 2023). By Resolution No. 794 of the Cabinet of Ministers of Ukraine dated July 7, 2022, the authority of the legal representative of a child who is temporarily relocated (evacuated) was entrusted to a person, for the period of his return to Ukraine, to a person appointed by a foreign diplomatic institution of Ukraine; the corresponding appointment is carried out on the basis of the decision of the executive body of the city, village, village council, district, district in Kyiv state administration, district/regional military administration/National Social Service Service on the return of displaced (evacuated) children – citizens of Ukraine (Deiaki pytannia povernennia ditei, 2022). In all these cases, the person identified as the legal representative of the child is temporarily entrusted with all the rights and opportunities to ensure the protection of the child's rights, measures to prevent any attempts to violate the rights of children, including through the use of self-defense, informing about all cases of violations of the children's rights the relevant military administration of the regional level at the place of permanent location of the institution, and in the absence of such an opportunity, the National Social Service, and the latter must take measures to stop violations of the rights of the child, appeal to the body of guardianship and care at the place of temporary stay (evacuation) with the aim of taking persons to temporary accounting for solving urgent issues of the specified persons, informing about the arrival of the child at the place of temporary stay (evacuation) in Ukraine or outside of Ukraine of the parents, other legal representatives of the child, as well as the relevant body of guardianship and care both at the place of permanent stay of the child and at the place evacuation. The authorized person – the legal representative of the child is authorized to take care of the child, its upbringing and development, to facilitate the communication of children with parents or other legal representatives, if such communication does not contradict the interests of the child, to prevent any attempts to violate the rights of children and persons, to provide (in if necessary) to the administrative or judicial authorities of the state of temporary stay of children and persons of information and docu-



ments necessary for them to make decisions on the appointment of accompanying persons as temporary guardians of children and persons (other decisions necessary for them to fulfill their obligations towards children and persons in the state of temporary stay), with a translation certified in accordance with the procedure established by law. On the other hand, such persons do not have the right to: leave children unattended, change their place of residence and their place of residence without the consent of the regional and Kyiv city military administration, and in the case of staying outside of Ukraine, without the consent of the National Social Service.

It should be noted separately that the resolution of the Cabinet of Ministers of Ukraine dated August 23, 2022 No. 940 provided for the responsibility of legal representatives of children for refusing the mandatory evacuation of a child. In this case, the guardianship or guardianship of such persons over children is terminated (this applies to legal representatives of children who are brought up in foster families, family-type orphanages, who are under their guardianship or guardianship, who are placed in the family of foster carers). Guardianship authorities in this case were authorized to apply two methods of protection: termination of the legal relationship regarding raising a child in a foster family, a family-type orphanage, stay in the family of a foster carer, stay under guardianship or care, as well as termination of actions that violate family rights, as they are authorized to ensure the evacuation of such a child, together with the National Service Service, local state administrations, local self-government bodies to foster families, family-type children's homes, families of foster carers, institutions in which the 24-hour stay of children who are in safe districts (Pro vnesennia zmin do deiakykh postanov shchodo udoskonalennia mekhanizmu provedennia evakuatsii, 2022).

Another relevant issue: determining the place of residence of a child with one of his parents outside of Ukraine and taking him abroad as ways of protecting the family rights and interests of the child in the conditions of martial law. In this aspect, the family legislation defines a complicated procedure for the temporary removal of a child outside the territory of Ukraine (when the consent of the parents of one of the parents is necessary for its removal, including a notarized one, since the Rules for crossing the state border by citizens of Ukraine in the version that was in effect until 12.03. of 2022 specifically provided for a notarial form of consent) created obstacles to ensure the best interests of the child, which in particular can include the interest of being in conditions safe for life and health, in those conditions in which the rights of the child can be ensured as fully as possible.

In this regard, amendments were made to the Rules for Crossing the State Border by Citizens of Ukraine, which provided that the departure of children under the age of 16, accompanied by one of their parents, grandmother, grandfather, adult brother, outside of Ukraine sisters, stepmothers, stepfathers or other persons authorized by one of the parents in a written application certified by the body of guardianship and care, is carried out without the notarized consent of the other parent and in the presence of a passport of a citizen of Ukraine or a birth certificate of a child (in the absence of a passport of a citizen of Ukraine)/documents, containing information about a person, on the basis of which the State Border Service will allow the crossing of the state border (Pro zatverdzhennia Pravyl peretynannia, 1995). This essentially changed the procedure for taking a child abroad under the legal regime of martial law.

If the child went abroad with one of the parents, then, when resolving a dispute about the child's place of residence under martial law, the court must take into account the priority of the child's interests when deciding any issue concerning children, the inalienability and priority of the child's right to life, her stay in a safe environment. As noted by the Supreme Court in its decision dated November 16, 2022 in case No. 953/6251/21, based on the principle of the legal status of the child, in particular the inalienability and priority of the right to life (the state is entrusted with the duty to ensure their survival and development in accordance with Article 6 of the Convention on the Rights of the Child), it is in the best interests of the child for the child to stay with the parent who is abroad, if there is a "serious risk" for the child in the event of his return to the state of his permanent residence. It should also be

taken into account that a long time could pass from the moment the child was moved to the time of the decision by the courts of the previous instances and the child could get used to the new environment (Oliinyk A., 2023). The very fact of the introduction of martial law on the territory of Ukraine is not a sufficient basis for determining the place of residence of a child with one of the parents. At the same time, the circumstances related to the safety of the child and the consequences of hostilities are significant, subject to establishment and assessment by the court (Decision of the Supreme Court of June 14, 2023 in case No. 760/31518/21) (Oliinyk A., 2023). Thus, it was actually recognized in court practice that the temporary removal of a child abroad in connection with the danger to his life, health and development due to the circumstances caused by the military conflict is essentially a way of protecting the child by his parents, adoptive parents or other persons, who are the legal representatives of the child. However, in our opinion, the court also applies the determination of the child's place of residence as a means of protection in the decision in disputes about the determination of the child's place of residence (if one of the parents denies that it is in the child's interests to take him abroad, change his permanent place of residence) as a means of protection (essentially covered by the content of such method as a change in the family legal relationship).

Thus, at present, notarized consent of the parents is not required for the child's departure abroad unaccompanied. The only deterrent mechanism preventing the unauthorized removal of a child abroad is the requirement for persons who are not the child's mother or father, his grandmother or grandfather, an adult brother or sister, stepmother or stepfather, to have a written letter from one of the child's parents applications for permission to take the child abroad, certified by the guardianship authority. This simplification carries the risk of the child's relatives abusing their rights and taking the child abroad without agreeing this removal with the child's parents and the intention to return the child to the state of his/her citizenship. The consequence of simplifying the mechanism of children's departure abroad in this way will be numerous cases of parents' struggle to find and return their children home (Kovalenko M., 2023; 12).

We can also recognize as a problem the inconsistency of the provisions of the Rules for crossing the state border by citizens of Ukraine and Art. 157 of the Family Code of Ukraine. The latter stipulates the need to obtain consent for the transfer of a child of any age abroad (and not one who has not reached the age of 16), besides this, it does not contain the possibility of the transfer of a child by other persons; abolition of the need for notarized parental consent for a child to travel abroad unaccompanied or accompanied by one of the parents is available at the level of a subordinate legal act, but the corresponding consent is required in accordance with the Family Code of Ukraine. In our opinion, the provisions of Art. 157 of the Family Code of Ukraine and clauses 2–3 of the Rules for Crossing the State Border by Citizens of Ukraine, however, it should be clarified in both cases that the simplified procedure for taking a child abroad applies only during the legal regime of martial law.

The third aspect is related to changes in the legislation of Ukraine, which regulates the issue of ensuring and implementing the child's right to maintenance.

Changes in legislation during martial law did not affect parents' obligations to provide for children and pay alimony. After all, both in peacetime and especially in current realities, children need special attention and care, additional guarantees for the protection of their rights and legitimate interests (Alimentni zoboviazannia). The main changes related to the legal regime of martial law in terms of the collection of alimony and additional expenses for the child were the following.

Firstly, amendments were made to the Law of Ukraine "On Executive Proceedings", namely, Chapter XIII of this Law was supplemented with Clause 10–2, according to which before the entry into force of the law on the regulation of relations involving persons connected with the state the aggressor, execution of enforcement actions is stopped, it is prohibited to replace debt collectors in enforcement proceedings, for which debt collectors include citizens of the Russian Federation (except for citizens who permanently reside in the territory of Ukraine), the collection of wages, pensions,

scholarships and other income of the debtor is stopped (however, an exception was made for alimony awarded, but not for additional expenses for the child). The deadlines for the submission of documents for the collection of alimony and additional expenses determined by this Law are interrupted and established from the date of termination or cancellation of martial law. According to decisions on the collection of alimony, enterprises, institutions, organizations, natural persons, natural persons – entrepreneurs who make deductions from the salary, pension, scholarship and other income of the debtor, transfer the collected funds to the account specified in the application or appeal of the collector, and in the absence details of the debt collector's account – to the corresponding account of the state executive service body, private executor. It is also prohibited to open executive proceedings and take measures to enforce decisions on the territory of territorial communities belonging to territories where active hostilities are being waged or temporarily occupied territories in accordance with the list approved by the central executive body, which ensures the formation and implementation of state policy with issues of the territory of Ukraine temporarily occupied by the Russian Federation (Pro vnesennia zminy do rozdilu XIII, 2022). As stated in the clarification of the Ministry of Justice of Ukraine dated April 1, 2022, in which it was stated that this Law does not provide for the prohibition of charging alimony debtors with interest for late payment. The decision on the payment of the fine is made by the court, as before, upon the application of the collector of alimony for the collection of the fine (Roz'iasnennia Miniustu, 2022). Therefore, the legal regime of martial law partially affected the process of executing the court decision on the collection of alimony for the child, but did not affect the very possibility of judicial protection of the child's right to maintenance. However, the collection of additional expenses for a child, if the collector is a citizen of the Russian Federation, is currently blocked. It also remains unclear whether the suspension of executive actions, if the debt collector is a citizen of the Russian Federation, applies to the execution of court decisions on the collection of alimony. In our opinion, if the legislator left the possibility of enforcement of child support decisions, it would be appropriate to preserve the possibility of taking executive actions aimed at the implementation of the corresponding court decision (if they are possible in the current conditions). Also, the provision prohibiting the opening of executive proceedings and taking measures to enforce decisions "on the territory of territorial communities belonging to the territories where active hostilities are taking place or temporarily occupied territories" is not entirely clear. Does this provision apply to debt collectors residing in these territories or to the debtor? In the latter case, of course, it is problematic to carry out the corresponding recovery, but it is hardly worth prohibiting its implementation (one should only provide for the possibility of stopping execution of executive actions in case of impossibility of recovery); in the first case, we can recognize the expediency of establishing a ban on opening executive proceedings and taking enforcement measures, but only with respect to debt collectors living in temporarily occupied territories, since such funds can potentially be used by the occupier. In our opinion, establishing a ban on opening executive proceedings and taking measures to enforce decisions on the territory of territorial communities belonging to the territories where active hostilities are taking place is impractical, and it should also only be possible to stop execution of executive actions in case of impossibility of recovery.

Secondly, the list of incomes that are taken into account when determining the amount of alimony for a child was expanded, as well as cases where the alimony payer left for a state with which Ukraine has not concluded an agreement on the provision of legal assistance were settled. In the first case, the possibility of withholding alimony was extended not only from the amounts of monetary support provided monthly (salary for a full-time position, salary for a military or special rank, percentage allowance for years of service, academic rank and scientific degree, qualifications and conditions of service), but also and other payments established by law, in particular, additional remuneration paid for the period of martial law, except for monetary support, which is not of a permanent nature, and other cases provided for by law. In the second case, it is determined that the amount of alimony is



calculated based on the amount of the employee's average salary for the area where such persons lived before going abroad. If such persons provide information about their earnings (income), alimony is calculated based on the amount of earnings (income) received by them abroad (Pro perelik vydiv dokhodiv, 1995).

Thirdly, due to active hostilities in some regions of Ukraine, as well as the temporary occupation of certain territories of Ukraine, a number of courts in Donetsk, Zhytomyr, Zaporizhia, Kyiv, Luhansk, Mykolaiv, Sumy, Chernihiv, Kharkiv and Kherson regions have suspended their activities. Taking into account the fact that active hostilities in certain territories or occupation should not limit the right of a participant in family relations to protect his family right or interest, by the relevant orders of the Chairman of the Supreme Court "On changing the territorial jurisdiction of court cases in conditions of martial law", taking into account the impossibility of courts to implement justice during martial law, the territorial jurisdiction of court cases heard in these courts was changed. The corresponding provision follows from the text of Part 3 of Art. 26 of the Law of Ukraine "On the Legal Regime of Martial Law": "In the event of the impossibility of administering justice by courts operating in the territory where martial law has been imposed, the laws of Ukraine may change the territorial jurisdiction of court cases considered in these courts, or in the established by law according to the order, the location of the courts was changed" (Pro pravovyi rezhym, 2015).

As already mentioned, in the event of a delay in the payment of alimony, the court has the right to apply such a method of protecting the child's right to maintenance as the collection of fines or interest in accordance with Art. 196 of the Family Code of Ukraine. Circumstances caused by the armed conflict can affect the property status of the debtor, his health, and therefore it is possible to complicate the debtor's ability to fulfill his alimony obligations. In this case, according to Art. 192 of the Family Code of Ukraine, the amount of alimony, determined by a court decision or an agreement between parents, may be subsequently reduced by a court decision at the request of the payer or recipient of alimony in the event of a change in the financial or family status, deterioration of the health of one of them. Indirectly, if such a debtor fails to fulfill his alimony obligations, this may affect the amount of the penalty (it may be reduced), but not the very possibility of its recovery (Simeinyi kodeks, 2002). The legal doctrine stated the need not to apply penalties and interest in the event of arrears of alimony or additional expenses for the child, which arose in connection with the loss of a job, a decrease in wages or a violation of the term of its payment, suspension of the employment contract, destruction of the enterprise, the owner or co-owner of which was the debtor and other significant circumstances that arose during the period of martial law or a state of emergency in Ukraine or certain regions, settlements (Buriachenko A., 2022; 231). In our opinion, the changes proposed by A. M. Buryachenko to Art. 196 of the Family Code of Ukraine are appropriate and timely, since the collection of fines and interest is not only a way to protect the child's right to support, but also a measure of family legal responsibility of parents, and responsibility should arise only in the presence of guilt (except for civil legal responsibility, which can be without fault).

An actual way to protect a child's right to support under the legal regime of martial law is the possibility of receiving temporary state assistance for children whose parents avoid paying alimony, are unable to support the child or whose place of residence is unknown in the amount of 50 percent of the subsistence minimum for a child of the appropriate age (according to Part 8 of Article 181 of the Family Code of Ukraine). Considering the fact that a large number of children lost their parents (who, due to the circumstances caused by the war, went missing), and some parents lost their homes and jobs, which deprived them of the opportunity to support the child to the same extent as before the war, the use of such a method of protection of family rights and interests as the payment of temporary state aid for the child is timely and ensures adequate protection of the child's right to maintenance.

**Conclusions.** So, on the basis of the conducted scientific study of applied aspects of the application of methods of protection of family rights and interests of the child in the conditions of the

legal regime of martial law, we can come to the following conclusions. The full-scale invasion of the Russian Federation on the territory of Ukraine in 2022, active hostilities, danger to the life and health of a child, including a sudden one caused by the launch of missiles and attack drones, led to a change in priorities in the protection of children's rights – the key in this first of all, the child's right to life, which, although not family, should also be ensured by his parents, adoptive parents, legal representatives. The above made it necessary to make changes and additions to the existing legislation, which was primarily peacetime legislation and could not take into account all the difficulties in the implementation of family rights and interests under the conditions of the legal regime of martial law. The reform of the legislation regulating the protection of the family rights and interests of the child, including the peculiarities of the use of methods of protection in conditions of war by the child's parents, other legal representatives of the child, the court, guardianship and guardianship authorities, and other bodies authorized to protect family rights, was no exception. rights and interests of the child. During 2022–2023, this legislation was significantly updated. At the same time, there are currently some shortcomings in the mechanism of temporary removal (evacuation) of children to safe regions or abroad. Thus, the primary assignment of the responsibilities of the legal representative of a child staying in an educational, social or medical institution to the head of this institution in the aspect of temporary removal (evacuation) of the child to safe regions or abroad was not always expedient, taking into account the fact that the head of the institution was able to evacuate on his own (in connection with this, the relevant institution was not able to evacuate children, due to the absence of a manager, or assign the relevant duties to another person). This shortcoming was eliminated after the approval of a new procedure for the temporary movement (evacuation) of children in June 2023. Also, the simplification of the procedure for the child's departure abroad unaccompanied by parents has led to the risks of the child's relatives abusing their rights and taking the child abroad without agreeing this removal with the child's parents and the intention to return the child to the state of his/her citizenship; we can recognize as a problem the inconsistency of the provisions of the Rules for crossing the state border by citizens of Ukraine and Art. 157 of the Family Code of Ukraine – the latter stipulates the need to obtain consent for the transfer of a child of any age abroad (and not one who has not reached the age of 16), besides this, it does not contain the possibility of transfer of the child by other persons; abolition of the need for notarized parental consent for a child to travel abroad unaccompanied or accompanied by one of the parents is available at the level of a subordinate legal act, but the corresponding consent is required in accordance with the Family Code of Ukraine. In our opinion, the provisions of Art. 157 of the Family Code of Ukraine and clauses 2–3 of the Rules for Crossing the State Border by Citizens of Ukraine, however, it should be clarified in both cases that the simplified procedure for taking a child abroad applies only during the legal regime of martial law.

The introduction of the legal regime of martial law led to a number of changes in the application of methods of protecting the child's right to maintenance – executive actions regarding the execution of court decisions on the collection of additional expenses for the child were limited in the event that the collector is a citizen of the Russian Federation who lives outside the territory of Ukraine; it is prohibited to open executive proceedings and take measures to enforce decisions on the territory of territorial communities belonging to the territories where active hostilities are taking place or temporarily occupied territories; the list of incomes that are taken into account when determining the amount of alimony for a child has been expanded, as well as cases where the alimony payer has left for a state with which Ukraine has not concluded an agreement on the provision of legal aid; the territorial jurisdiction of cases concerning the collection of alimony and additional expenses has been changed, i.e. other courts have been empowered to apply the collection of alimony, additional expenses, as well as liability for violation of alimony obligations as methods of protection

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DOI <https://doi.org/10.30525/2592-8813-2024-1-4>

## SHAPE OF CENTRAL BANK MONEY AIMS FOR DIGITAL PROGRAMMABLE COINS: FROM METAL AND PAPER TO A FULLY CONTROLLED DIGIT (DISPLACEMENT HYPOTHESIS)

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**Abstract.** The form of money used by central banks around the world has been constantly changing over time. The *purpose* of the study is to identify unpopular characteristics and the future role of CBDCs in terms of their likely impact on the social order. *Conclusions.* The benefits of implementing CBDCs for the state are enormous, and they are at least: (a) total income taxation, (b) total financial monitoring (public procurement, foreign investment, political party financing, etc.), (c) a political tool in the struggle for power, (d) an effective tool for reducing crime and corruption. On the contrary, the benefits of CBDC for the population are negligible, compared to the current system of electronic money/transfers: there is a reasonable probability of a significant loss of classical constitutional rights and freedoms: (a) loss of personal privacy, (b) limited political choice, (c) financial independence, (d) fiscal oppression, (e) negative interest rates, (f) introduction of time value of money. Based on this likely trend, from the perspective of legal regulation of CBDCs, they should be treated – in addition to money – as a database of big data on who, where, when and how uses and stores money in a given country, which affects the constitutional rights of citizens.

**Key words:** bitcoin, cryptocurrency, virtual assets, E-money, programmable CBDC, FinTech, GovTech, CashLess.

**Introduction.** The form of money of the world's central banks has been constantly changing over time and absorbing the best of the existing trends of the relevant time of human development. But such changes were even more influenced by certain characteristics of such new forms of money, which were certainly useful for the state budgets of issuing countries. In today's world, the influence of the following characteristics in the latest technologies that can be used in future forms of money no less influences the decisions of issuing states on their implementation in the near future.

Since ancient times, money has been minted, usually by the respective mints of different countries of the world, from precious metals, and it was most often gold or silver. This was accompanied by a struggle between the barter and monetary systems of commodity exchange. And of course, people could only perceive the form of money as made of precious metal, because otherwise they would have preferred any necessary property that could be exchanged for the goods they had. Later, due to the lack of sufficient precious metal, mints switched to minting lower-ranked coins from cheap metal. But when the struggle of barter exchange was lost to the monetary system, everything began to change. Then, more and more often, state mints minted all denominations of coins not from gold or silver, but from copper or brass. Over time, a new form of money was added: paper money. And at the beginning of such innovations, they (paper money – author's note) were the state's obligation to back them with precious metals. But later, these obligations on the part of states were simplified. And the form of money became exclusively paper, which was backed only by a promise from the state that something could be bought with it.

*Michael Peneder* from the Austrian Institute for Economic Research (WIFO) gave his view on the nature of Bitcoin's emergence. When the financial crisis of 2008–09 led to a significant loss of public

confidence in the monetary system and the institutions that support it, the subsequent expansionary monetary and fiscal policies raised fears that governments would lose the value of their debts through inflation. By undermining the legitimacy of the established system, the financial crisis thus gave impetus to proponents of alternative monetary concepts. Immediately after the crisis, one of the most significant developments was the introduction of the Bitcoin protocol (Peneder, 2022).

**Literature Review and Preconditions.** Cryptocurrencies today have different technical platforms (Hrytsai, 2022b) and extensive classification (Hrytsai, 2022a, 2023a). Virtual currency is different from fiat currency (also called "real currency", "real money" or "national currency"), which is: the coins and paper money of a country that is its legal tender, circulated and widely used and accepted as a medium of exchange in the issuing country. Virtual currency also differs from electronic money, which is a digital representation of fiat currency and is used to electronically transfer value (expressed in fiat currency). Electronic money is a mechanism for the digital transfer of fiat currency, i.e., it is used for the electronic transfer of currency, has the status of legal tender (FATF, 2014).

At the beginning of the study, will present and compare some of the latest definitions of CBDC provided by leading institutions in the field of global finance, whose opinion is undoubtedly considered highly expert and recognized worldwide as a trendsetter in the financial world system.

Board of Governors of the Federal Reserve System of the USA (FRS): *"It is a digital form of central bank money that is widely available to the general public. "Central bank money" refers to money that is an obligation of a central bank. In the United States, there are currently two types of central bank money: physical currency issued by the Federal Reserve and digital balances held by commercial banks in the Federal Reserve System. While Americans have long held money primarily in digital form – for example, in bank accounts, payment apps, or through online transactions – CBDC will be different from existing digital money available to the general public because CBDC will be a liability of the Federal Reserve, not a commercial bank"*. ("FRS – Frequently Asked Questions," 2022).

International Monetary Fund (IMF): *"A digital form of existing fiat money that is issued by a central bank and serves as legal tender"* (IMFBlog, 2021; "International Monetary Fund," 2023).

European Central Bank (ECB): *"A digital form of fiat money that is publicly available, issued by the state and has the status of legal tender"* (Burlon, Montes-Galdón, Muñoz, & Smets, 2022; "European Central Bank," 2023).

Bank for International Settlements (BIS): *"An electronic form of a national currency issued by a central bank that is obliged to back it"* ("Bank for International Settlements," 2023; "Central Bank Digital Currencies", 2018).

As of the beginning of 2022, according to the Bank for International Settlements (BIS) statistics, there are three fully operational CBDCs in the world and at least 28 pilot projects are at various stages of implementation. And 68 central banks have publicly announced the start of their work on CBDCs (Auer, Cornelli, & Frost, 2020).

Also, data from another think tank, the Atlantic Council, as of the beginning of 2023, shows that more than 100 countries are actively studying CBDC at the research and development stage ("Central Bank Digital Currency (CBDC) Tracker," 2023).

Countries that are exploring CBDC in one way or another (Shumba, 2022) in 2022 can be conditionally classified as: researching CBDC, inactive CBDC (suspended CBDC research), developing CBDC (technical assembly and testing in the laboratory), having a CBDC pilot project, launching CBDC, canceling CBDC (Shumba, 2022):

– *Researchers*: The United States, Jamaica, Chile, Russia, Kazakhstan, Turkey, Iran, Pakistan, India, Israel, Palestine, Lebanon, Tunisia, Ghana, Kenya, Rwanda, Madagascar, Eswatini, Mauritius. Japan, Taiwan, Indonesia, Philippines, Australia, New Zealand;

– *Inactive*: Finland, Estonia, Lithuania, Denmark, Italy, Morocco, Egypt, South Korea, Haiti, Trinidad and Tobago. Uruguay;

- *Under development*: Canada, Venezuela, France, UAE, Cambodia;
- *pilot projects*: Dominican Republic, St. Vincent and the Grenadines, St. Kitts and Nevis, Antigua and Barbuda, St. Lucia, Grenada, Bahamas, Sweden, Ukraine, China, Thailand, Republic of Korea, Singapore;
- *launched for widespread use*: Brazil;
- *Canceled, i.e. decommissioned*: Senegal, Ecuador (S. O. Hrytsai, 2022c).
- *Pilot projects* of countries implementing retail (China and Ukraine (S. O. Hrytsai, 2022d, 2022e)), wholesale or mixed forms (China) can be classified separately (С. Грицай, 2023; S. O. Hrytsai, 2023).

In March 2022, the U.S. administration granted "highest urgency" status to research and development of potential CBDC design and implementation options in the United States. The Executive Order highlights a number of benefits of CBDCs, including expanding access to financial services, reducing the cost of transferring funds, and strengthening U.S. leadership in the global financial system. The Administration expects to receive a joint research assessment of the impact of CBDCs from regulators in the fall of 2022 (House, 2022). At the end of 2022, the head of the US Federal Reserve announced that there was no decision on the launch of the digital dollar (*Opportunities and Challenges of the Tokenisation of Finance*, 2022). In early 2022, the White House presented a concept for regulating the crypto industry ("Fact Sheet: White House Releases First-Ever Comprehensive Framework for Responsible Development of Digital Assets," 2022). Which plans to strengthen control procedures for providers of digital asset-related services. In addition, the United States has developed a bill that provides for a two-year ban on the issuance of algorithmic *stablecoins* ("House Stablecoin Bill Would Put Two-Year Ban on Terra-Like Coins", 2022).

The European Commission plans to propose a draft law in early 2023 to define the status and create a legal framework for the legalization of the digital euro. In his speech in March 2022, Fabio Panetta, a member of the Executive Board of the European Central Bank (ECB), emphasized that the digital euro project aims to provide access to central bank money in digital form for daily transactions, allowing users to enjoy the high standards of privacy provided by the CBDC ("Digital Euro Bill Due Early 2023," 2022; European Central Bank, 2022).

The People's Bank of China began its journey towards the digital yuan in 2014. The country is currently conducting large-scale tests in selected cities, and during the 2022 Olympic Games, e-CNY was one of only three available payment methods offered to visitors.

In February 2022, India's finance minister promised to launch a virtual version of the rupee by the end of the year, and the following month, the Philippines announced its own CBDC pilot ("Union Budget FY 2022–2023," 2022, pp. 2022–2023).

Some governments take a completely opposite approach to the classic idea of fiat money, when introducing a CBDC in the state. This approach involves the country's recognition of Bitcoin (BTC) as a legal means of payment, additional to the existing one. Salvador and Ecuador can be considered such states. Micronesia, Palau, East Timor, Zimbabwe and the Marshall Islands (S. O. Hrytsai, 2022b).

**Aims and methods.** The aim of the study is to identify their leading characteristics (which are attractive to the state) and the future role of CBDCs in the evolution of money forms, at the level of hypothesizing.

To achieve this goal, the following tasks are set: 1) to characterize the attractive properties of CBDCs for the state; 2) to determine the role of cryptocurrencies in the implementation of CBDCs; 3) to outline the evolution of the form of money against the background of CBDC development.

*Limitations of the research.* The study does not address the choice of platform, structure, and form of CBDC, nor its impact on the financial and credit system. It only considers CBDCs from the point of view of their inherent technological features that are likely to be attractive to the state: as a future mass form of money for the population.

*The methodological basis* of the study includes a combination of philosophical, general scientific and special legal methods of scientific knowledge. The chosen research methodology meets the tasks set and contributes to the creation of an optimal structure of the conclusions obtained and allowed to identify the main problems.

**Results of the study.** What is important to understand: most CBDC projects start with stablecoins pegged to national currencies. You can create a stablecoin and, gradually updating the smart contract, building up the user base and experience, transfer it to CBDC, giving the asset under the control of the central bank. When the movement initially comes from the central bank, it is usually tied up in sandboxes and bureaucracy, so the process is very slow. Any blockchain wallet is a smart contract. This means that it is possible to create a multi-sig system for central banks and banks, and these flows can be divided: users have assets, and wallets, or rather the ability to set certain rules for it, can be given to banks. In other words, you can go to CBDC evolutionarily, through stablecoin, gradually introducing new rules and conditions into the smart contract. And this can be done almost imperceptibly for the user without causing any inconvenience (“What will the launch of a state digital currency change?,” 2022).

Starting our research on this small technological excursion from leading experts in blockchain technology and CBDC in particular, it is impossible not to recall the famous phrase: “*the devil is in the details*”.

**1. CBDC & electronic money.** There are many proponents of CBDC and they describe a different set of benefits.

The potential benefits of CBDC include lower transaction costs, easier monitoring of transactions, and the creation of a backstop to a privately managed payment infrastructure. In addition, well-designed retail CBDC can also broaden financial inclusion, a particular priority for developing economies, and serve as a backstop to the infrastructure of privately managed payments systems (E. S. Prasad, 2021).

The benefits and risks of CBDCs depend on their design and issuance, but Bank of America expects central banks in developed economies to focus on payments efficiency and those on developing countries to focus on financial inclusion. Still, CBDCs aren't without their risks. They may drive competition with bank deposits, and could lead to a loss of monetary sovereignty and inequality among countries globally (Canny, 2023).

It is unclear whether DLT offers unconditional advantages for a CBDC, including those designed to address financial inclusion barriers. Both traditional, centrally managed databases and DLT-based databases can store data multiple times in physically different locations. CBDC implementation poses other operational challenges. DLT-based CBDC infrastructures have lower transaction throughput, presenting impediments to widespread use except in small jurisdictions (Auer et al., 2022).

CBDC's American researchers note: “[...] *In the private sector today, Americans regularly use multiple forms of digital dollars. They send digital payments using credit cards, debit cards, prepaid cards, and several mobile applications (e.g., Zelle, PayPal, or Cash App). In fact, it's not just payments that have gone digital. Nearly every financial institution offers services—from savings accounts to mortgages—via mobile applications. So, there should be no misunderstanding: the U.S. dollar is already widely available in digital form.*” In addition, they emphasize the following: “*Proponents claim that a U.S. CBDC would promote financial inclusion, spur faster payments, protect the U.S. dollars' status as the world's reserve currency, and make it easier to implement monetary (or fiscal) policy. Yet, as this brief demonstrates, all four arguments fail to stand up to scrutiny.*” (Anthony & Michel, 2022).

Further, CBDCs really don't add anything novel to the market in terms of benefits for consumers. To the extent people want it, many currencies are available in digital forms through debit cards, payment apps and even prepaid cards (Emergencies Act, n.d.).



Credit Union National Association commented on the lack of advantages of CBDC over existing banking technologies: *“While there are no doubt opportunities for improvement, we believe most, if not all, [of these opportunities] can be addressed by innovations in the current financial services framework and through continued public-private partnerships, without the introduction of a novel digital currency that could destabilize the system.”* (“Central Bank Digital Currency Creation Needs ‘Serious, Exacting’ Consideration,” 2022).

## **2. CBDC will displace everything: both cryptocurrency and cash fiat money (hypothesis).**

The Bank of America research report reflects that CBDCs are a natural evolution of the monetary and payment systems: *“CBDCs do not change the definition of money, but they will likely change how transfers are made in the next few years. Central bank digital currencies have the potential to revolutionize the global financial system, becoming the most significant technological advancement in the history of money.”* CBDCs can be issued and operated both centrally and using blockchain technology. Since CBDCs are issued by a specific central bank, such digital currencies can be controlled by the country's authorities, unlike cryptocurrencies (Canny, 2023).

### *2.1. People's Republic of China (PRC).* China's experience very clearly confirms our hypothesis.

2019. According to Reuters, experts of the Chinese Central Bank said that the digital yuan should not be considered a weapon against cash. The new financial instrument, as conceived by the developers, should be a complement to fiat money (*“China's national cryptocurrency will allow users to remain anonymous,”* 2019).

But at the same time, Mu Changchun, head of the People's Bank of China's (PBoC) Digital Currency Research Institute, said that the asset is intended to replace the existing fiat (*“China's central bank reveals plan to distribute digital yuan,”* 2019).

2021. In late September 2021, the People's Bank of China (PBOC) banned all cryptocurrency transactions. The PBOC cited the role of cryptocurrencies in facilitating financial crime as well as posing a growing risk to China's financial system owing to their highly speculative nature. However, one other possible reason behind the cryptocurrency ban is an attempt to combat capital flight from China (*“What's behind China's Cryptocurrency Ban?,”* 2022).

Neil Kashkari, president of the Federal Reserve Bank of Minneapolis, has this to say about China's chosen strategy: *“I understand why China is doing this. If they want to track every transaction you make, you can do that with central bank digital currency. You can't do that with Venmo. If you want to introduce negative interest rates, you can do that with central bank digital currency. You can't do that with Venmo. And if you want to directly collect taxes from customer accounts, you can do it with central bank digital currency. You can't do that with Venmo. I understand why China is interested in this. But why would the American people be in favor of it?”*

Yet, as Cornell economist Eswar Prasad warns in his new book, *The Future of Money: How the Digital Revolution Is Transforming Currencies and Finance*, *“digital central bank money is only as strong and credible as the institution that issues it”*. More importantly, *“In authoritarian societies, central bank money in digital form could become an additional instrument of government control over citizens rather than just a convenient, safe, and stable medium of exchange.”* (E. Prasad, 2021).

James A. Dorn believes that the real intentions of introducing a digital yuan are likely to be greater government control over the payment system and close monitoring of transactions and even personal behavior (James A. Dorn, 2021).

### *2.2. Countries of the Eastern Caribbean. The Bahamas.* In the Bahamas, all supervised financial institutions can operate Sand Dollar wallets. This includes commercial banks, credit unions, money transmission businesses (MTBs) and other PSPs. Sand Dollar wallets exist on customers' smartphones. To date, the main providers of Sand Dollar wallets are MTBs and other PSPs. At the time of interview, only one commercial bank and one credit union were participating in the Sand Dollar scheme.

Allowing for remote onboarding of customers, using e-KYC methods, was highlighted as an important CDD feature. Wallets with higher balance or transaction limits will be subject to standard CDD, while those with lower limits will be subject to simplified rules. Wallets with lower limits will be subject to simplified rules. Such "basic" wallets or accounts have been offered under DCash in the Eastern Caribbean and Sand Dollar in the Bahamas.

Some central banks observed an additional layer of data security when using a DLT-based infrastructure. In the Eastern Caribbean, DCash is built on a private permissioned blockchain architecture. The central bank has access to the entire retail transaction record and can locate all information pertaining to a specific account. Personal information (ie the identity) of account holders is kept separate from the transaction record and is accessible only by the institution that established the account. None of the interviewed central banks anticipates a design where PSPs or commercial banks have access to personal and transaction information beyond that necessary for the execution of their clients' transactions.

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2.3. *Nigeria*. Central bank Governor Godwin Emefiele said, "The destination, as far as I am concerned, is to achieve a 100% cashless economy in Nigeria." ("Shunned Digital Currency Looks for Street Credibility in Nigeria," 2022).

The Nigerian government has encouraged CBDC adoption in every way possible, but nothing has been effective. In August 2022, it lifted access restrictions so that bank accounts were no longer required to use CBDC. Then, in October 2022, it offered discounts if people used CBDC to pay for cabs ("Shunned Digital Currency Looks for Street Credibility in Nigeria," 2022).

Having failed further, the Nigerian government redoubled its efforts and moved on to more drastic measures – limiting cash. In December 2022, the Central Bank of Nigeria began limiting cash withdrawals to 100,000 naira (\$225) per week for individuals and 500,000 naira (\$1,123) for businesses (*Revised Cash Withdrawal*, 2022).

The Nigerian government also decided to redesign the currency during this period to "restore the Central Bank of Nigeria's (CBN) control over currency in circulation" and "further deepen the move toward a [cashless] economy," according to a press release from the Central Bank of Nigeria (*CBN Update*, 2022).

After this design reform, not only are citizens limited in how much they can withdraw, but commercial banks do not have cash to dispense because many are still waiting for new cash to arrive.

By imposing these restrictions, the Nigerian government has succeeded in depriving the economy of cash and setting the stage for the CBDC to finally come into focus.

In Nigeria, citizens have taken to the streets to protest the nation's cash shortage, further objecting to their government's implementation of a central bank digital currency (CBDC). The shortage came about due to cash restrictions aimed at pushing the country into a 100% cashless economy. Yet, instead of adopting the CBDC, Nigerian protesters are demanding paper money be restored.

The country's experience strongly suggests the average citizen understands that CBDCs present a substantial risk to financial freedom while providing no unique benefit. That much should be clear from the abysmal adoption rate in Nigeria, where less than 0.5% of Nigerians have used the CBDC. To put that number into perspective, more than 50% of Nigerians have used cryptocurrency (Emergencies Act, n.d.).

According to a recent blog by IMF, several Sub-Saharan African (SSA) central banks are exploring the use of digital currencies to enhance payment systems, following Nigeria's October introduction of the e-Naira. South Africa and Ghana are in the pilot phase of a digital currency, while Uganda, Kenya, Rwanda, Mauritius, Madagascar, Zimbabwe, Eswatini, Namibia, and Zambia are researching the process. (Bailey, 2022).

*2.4. Other examples.* In India in 2019, a draft bill that was in the works envisioned a complete ban on cryptocurrencies, but at the same time excluded the proposed official digital currency. The bill even proposed prison terms for individuals who “*extract, generate, hold, sell, deal, issue, transfer, dispose of or use cryptocurrency in India*”. Although this bill did not make it to parliament, in 2021 a study by the Under Secretary (Economic Affairs) revived the legislative push for a ban “*all private cryptocurrencies, except for any virtual currencies issued by the state*” (“Cryptocurrency Regulations Around the World,” 2023).

Juda Agung, the assistant governor of Bank Indonesia, talked about cryptocurrency and central bank digital currency (CBDC). Juda Agung said that digital currency would be one of the tools to fight crypto. He said that Bank Indonesia has been looking at launching a digital currency since the beginning of 2021 year and wanted to issue a digital rupiah for the following reasons: 1) For using digital currency as legal tender to fight cryptocurrency; 2) A CBDC would be one of the tools to fight crypto; 3) CBDC would be part of an effort to address the use of crypto in financial transactions (Aditya, 2021; “Indonesia's Central Bank Sees CBDC as Means to ‘Fight’ Crypto,” 2021).

Globally, nations' actions have demonstrated that they want a CBDC specifically to hold on to their monopoly over national currencies. In the United States, Representative Jesus “Chuy” Garcia (D-IL) – who would later cosponsor a bill to introduce a CBDC – announced the “Keep Big Tech Out of Finance Act” in an attempt to prohibit large technology companies from offering financial services (e.g., cryptocurrencies). Such bans may not be inherent to the design of a CBDC, but there is no denying that CBDCs are being used across the world to combat the existence of cryptocurrencies (Anthony & Michel, 2022).

**3. CBDC characteristics acceptable to the state.** In its 2015 study, the FATF noted that certain features of cash, including anonymity and the absence of a control log, make it attractive for illegal transactions (FATF, 2015).

Some central banks interviewed are considering programmability features of CBDC to enforce rules or to apply conditions to payments. Programmability refers to the ability to automate or to direct transactions, eg to make a payment contingent on certain pre-specified conditions. This can allow for a range of new features, including self-executing protocols (“smart contracts”). Programmable money features have already been used by some Chinese districts within the e-CNY pilot, where the CBDC, distributed through “red envelopes”, would expire in a few days if not used by the recipient. In its CBDC research the NBU has assessed the potential of programmability for government payments and for likely new business models and products in the financial markets. Programmability using smart contracts is embedded within DLT systems. However, it can also feature in non-DLT-based CBDC. Central banks need to apply strict controls on how programmability is applied to avoid possible fraud and misuse of a CBDC (Auer et al., 2022).

Most central banks interviewed described a system where privacy will be maintained, but without full anonymity. The provision of CBDC with full anonymity is not being considered by any of the central banks that participated in the study, including those that described financial inclusion as a primary motivation for researching CBDCs. For example, in the Bahamas the CBB is taking a centralized approach to record-keeping, maintaining the ledger of all individual holdings of the Sand Dollar. Individual transaction information will be maintained by the service provider managing the customer wallet (Auer et al., 2022).

In their work, Nicholas Anthony and Norbert Michel emphasize the importance of the: While a CBDC would not offer any unique benefits to Americans compared to existing technologies, it would pose serious risks (Anthony & Michel, 2022).

Arthur Hayes, the former CEO of the BitMEX Bitcoin exchange, called CBDC "pure evil" and an ideal tool for governments and an encroachment on sovereignty over honest transactions between people. The main difference between modern fiat and digital currencies of central banks, Hayes said, is the possibility of full control of the latter by the authorities. Hayes considers commercial banks to be allies in the fight against national digital currencies. In his opinion, with the introduction of CBDCs, these financial institutions will become unnecessary intermediaries between people and the Central Bank (Hayes, 2022).

The General Manager of the Bank of International Settlements (BIS), Agustín Carstens, sent a message regarding the future direction of CBDCs: *"We don't know who's using a \$100 bill today and we don't know who's using a 1,000-peso bill today. The key difference with the CBDC is the central bank will have absolute control on the rules and regulations that will determine the use of that expression of central bank liability, and also we will have the technology to enforce that."* (The Market Sniper, 2021).

Speaking at the IMF-World Bank Annual Meeting 15.10.2022, Deputy Managing Director Bo Li said that a CBDC could improve financial inclusion through programmability: *"A CBDC can allow government agencies and private sector players to program, to create smart contracts, to allow targeted policy functions."* He proceeded to give a couple of examples, such as welfare payments, consumption coupons, and food stamps. Money can be programmed a targeted for one type of use, he stated; *"This potential programmability can help government agencies to precisely target their support to those people that need support"* (IMF, 2022).

**3.1. Loss of personal privacy.** Representatives of the Central Bank of China, as reported by Reuters, said: "The Chinese digital yuan will not be a tool for controlling the country's citizens. The latter will be able to keep their transactions anonymous. The national cryptocurrency is designed to balance privacy concerns and provide the authorities with the necessary information. Mu Changchun, head of the Digital Currency Research Institute at the People's Bank of China (PBoC), said: *"We understand the need of the public to maintain the anonymity they receive when using fiat money. We will give people the opportunity to remain anonymous"* ("China's national cryptocurrency will allow users to remain anonymous," 2019).

At the same time, Mu Changchun noted that the holders of the digital yuan will not receive any interest payments: therefore, the digital currency will not cause negative consequences in the country's monetary policy (*"China's central bank reveals plan to distribute digital yuan,"* 2019).

Cyber security is another challenge that can affect data privacy. A CBDC infrastructure is an attractive target for cyber criminals given both the funds and types of information it stores. As such, it should be subject to at least the same cyber resilience expectations as other critical financial market infrastructures. While the key vulnerability differs between a conventional and a DLT-based CBDC infrastructure, all parties connected to this infrastructure – the central bank, financial intermediaries, mobile phone operators, merchants etc. – should have effective cyber security safeguards and processes in place. Applying a cyber resilience framework such as that of the US National Institute of Standards and Technology (NIST) and regularly conducting penetration testing is important to shield the target information. This is similar to the work central banks already undertake for real-time gross settlement (RTGS) and other payment systems (Auer et al., 2022).

**3.2. Loss of financial independence.** By managing CBDCs, you can control how they are used or even block them completely. Purchase management can be expressed as a restriction on the purchase of certain goods, and in regulating the time and even the place of their purchase.

Examples include the regulation of CBDC spending for children: limiting the purchase of alcohol and tobacco. Or here's an example of CBDC supporters who see advantages in setting the time and



amount of sweets for children (“Digital Newspaper & Magazine Subscriptions,” 2021). But we need to think bigger, because no one is safe from the fact that restrictions can be used for bad reasons. For example, restrictions on political opponents or their sponsors during election campaigning; or persecution of those who are not acceptable to the totalitarian regime in the form of a complete freeze of CBDCs under a false pretext. The options for using CBDC to restrict the rights of citizens are much wider and are incredibly important.

But as long as there is a cash form of money, people have a choice along with the electronic form. This right to choose may disappear if CBDC displaces the cash form of money – which is our theory of its displacement by CBDC.

*3.3. Fiscal dominance of the state.* Many authors conclude in their studies that replacing cash with CBDCs will lead to fiscal dominance of the state, which is one of the factors of public rejection of financial innovations (E. S. Prasad, 2021).

CBDC can make taxation easier, safer and more reliable for the state. Key features include real-time taxation, automatic auditing, and automated integration with public and private registries. Instead of placing the accounting burden on individuals and companies, governments can receive taxes automatically and in real time (Lazorenko, A., 2022).

*We believe that fiscal dominance of the state at the digital level, based on historical experience, can border on lawlessness in a difficult situation in the state (low GDP, war, etc.), as the properties of programmable CBDC are a great temptation to cross it.*

*3.4. Application of negative interest rates for CBDC storage.* In our everyday consciousness, there are positive interest rates, for example, on a bank deposit or an account balance. But there are already many supporters of negative interest rates. This means that if you keep money in your account for a long time, the bank takes a certain annual percentage of your savings for it. And this is justified in the theory of stimulating purchases. With the help of CBDC, this is a fairly easy to implement financial and economic idea of the future (Buiter, 2023; Rogoff, 2020).

*3.5. Timing the validity of CBDCs as a time limit for their use.* The majority of comments on the Federal Reserve's (Fed) proposal for a central bank digital currency (CBDC) continue to be negative about CBDC. Specifically, more than 66 percent of the 2,052 commenters expressed concern or outright opposition to the idea of a CBDC in the United States. The most common concerns related to financial privacy, financial oppression, and the risk of disintermediation of the banking system (Anthony, 2022).

In fact, Rohan Grey, assistant professor at Willamette University, said it's already an established trend with some types of government-issued digital money. In the U.S., for instance, food welfare programs like Electronic Benefit Transfer (EBT) set barriers around what can be purchased as well as time-limits within which the benefit must be spent (“EBT – Electronic Benefit Transfer,” n.d.; “If Money Is Speech, CBDCs Should Be Tools for Freedom,” 2022).

**4. Digital prison.** The authorities of many countries (China, Canada, etc.) have repeatedly drawn attention to the organization of punishment and deprivation in the form of a "digital prison". As practice has shown, financial restrictions for those who are undesirable to the government are very effective (below are examples).

In our cashless society, we need to take digital jail seriously. The move to a cashless society, which has been accelerated by Covid restrictions, makes it almost impossible to function in society without a bank account and a credit card. Now, without a working bank account, you can't pay for a telephone or internet. You can't make car payments, rent, or travel. You also can't exercise most basic rights from freedom of speech to freedom of assembly. You can't even pay a lawyer to defend you. The government doesn't need to break down your door anymore to effectively remove you from society. They can do it with the press of a button (Anglin, 2022).

4.1. *Protests in Canada in 2022 (trucker protests)*. The trucker protests in Canada earlier this 2022 year forced a closer look at the desires and motivations of this key demographic of voters. Although their grievances are different, these truckers are united in their demand for change. Because the trucking industry plays a vital role in Canada's economy, their voices cannot be ignored. The question now is what impact these protests will have on Canadian politics (“Canadian Trucker Protests News, Insights & Impacts,” 2022).

At that protest time, the government's decision to invoke the Emergency Act (Emergencies Act, n.d.) in response to trucker protests may have a lasting legacy in Canadian public life. One aspect of the Canadian government's response that may have particularly significant implications in the future is the use of "digital jail," or the freezing of bank accounts and digital assets. The Canadian government's actions targeting the assets of those associated with the protests have demonstrated both the potential for such measures and the lack of applicable legal protections (Lavoie, 2022).

As during the October Crisis, the lack of legal safeguards regarding government action increases the likelihood of mistakes. Given that many of those who donated to the convoy do not seem to have a good understanding of the law and how their donations might be used, the abandonment of questions of mens rea (guilty intent) and the usual burden of proof means that the government can freeze first and ask questions later. By then it may be too late. A lawyer interviewed by the CBC suggested that in some cases, risk-averse banks "might just decide to close a person's account" without bothering to separate the guilty from the innocent. The long-term consequences of such excessive policies would be worse than temporary incarceration. The government's actions are disturbing enough, but what should really worry us is the ease and stealth with which it is done. When we do not see the consequences of government action, the risk of government misconduct increases. It also shows how powerful the technology is for the governments and companies that control our digital world. When they work together – whether it's financial de-platforming of extremist minorities or blocking unwanted speech – there is literally no way to escape their influence, nowhere to hide. The fact that the use of the financial system against nonviolent protesters and their distant supporters has become the government's first resort should worry anyone who understands the role of civil disobedience in democracy (Anglin, 2022).

4.2. *Comments*. In the context of examining the Canadian case of the "trucker protests," it would be appropriate to quote William Luther of the American Institute for Economic Research: "At some point the CBDC, which does not provide a high degree of financial privacy, will be used to monitor and censor the transactions of its political enemies. It is foolish to think otherwise."

‘If you give me six lines written by the hand of the most honest of men,’ the French cleric and statesman Cardinal Richelieu said in the 17th century, ‘I will find something in them which will hang him.’ (Luther, 2022).

**Discussion.** There is an unspoken, and even rumored, opinion in society that cryptocurrencies and CBDCs are allegedly being tested in the so-called “third world” countries. And this is indeed based on fact. Let's recall which countries have introduced Bitcoin as a legal tender at the legislative level along with fiat money: El Salvador in 2021, Central African Republic in 2022. And here is a list of countries that have recognized Bitcoin's exchange and payment functions as one of the main ones inherent in fiat money; and Bitcoin is legally in circulation in these countries at the level of fiat money, where you can safely pay for goods and services with it: Mexico, Argentina, Brazil, Venezuela, and many other "third world" countries (“Cryptocurrency Regulations Around the World,” 2023). Thus, it can be argued that the so-called “third world” countries are really the pioneers.

1. *Natalie Smolenski*, in her paper “*The Bitcoin Policy Institute*,” very properly expressed the view of the political trend of introducing CBDC: “*In other words, those calling for the implementation of CBDC naively believe that it can be done without creating a centralized surveillance system for all financial transactions. Simply put, even if such surveillance is not included in the [initial] design, it*

would be trivial to add it at a later stage. Once the door to surveillance is open, it is virtually impossible to close it.” (Smolenski, 2022).

The 2022 study “*Behind the Scenes of Central Bank Digital Currency: Emerging Trends, Insights, and Policy Lessons*” showed the political goals of introducing CBDC (Soderberg et al., 2022). However, based on our research, we can state that it is incomplete (S. O. Hrytsai, 2022a).

The main conclusion drawn by the group of authors of the study “*From Bitcoin to Central Bank Digital Currency: Making Sense of the Digital Money Revolution*” is that the introduction of CBDCs will spread around the world in the near future, and although there is no consensus on which model should be adopted, one thing is certain: there is a particular need for careful planning of such a model. The success of CBDCs depends on the extent to which they meet the expectations of potential users and minimize the effects of the current negative economic dynamics (Cunha, Melo, & Sebastião, 2021).

We can agree with the authors of the study that CBDC will spread in the near future. However, we believe that the conclusions drawn are incomplete because they do not highlight the threats that CBDCs pose to the freedom and democracy of society. Although it is impossible to ignore the obvious benefits of the introduction of CBDCs, such as their positive prospects in the fight against corruption (Hrytsai, 2023b). Nevertheless, the trend of our study is closer to the conclusions drawn in our work *Nicholas Anthony and Norbert Michel*. In particular, they argue “[...] *The experiment should be left on the drawing board because CBDCs will ultimately usurp the private sector and jeopardize Americans' basic freedoms. They have no place in the American economy. Congress should explicitly prohibit the Federal Reserve and the Department of Treasury from issuing CBDCs in any form.*” (Anthony & Michel, 2022).

This applies not only to the loss of financial privacy. Because its loss leads to a loss of personal privacy, for example, in transportation (it will be visible not only when, but also where transportation tickets were bought), political expression (it will be visible to which political party you donate) and many others.

Notwithstanding the current trend in the world of digitalization of public services (Hrytsai, 2023c). Today, personal data (including financial data) is scattered among various financial institutions. With the introduction of CBDC, all information will be in the central bank. As well as the bulk of the tokens, CBDC will be stored there as well. Against this backdrop, we should not forget about the threat of hacker attacks on such assets, which have been rife in the history of the last ten years. And the stakes here will be on the scale of the whole country – the loss of personal data of all (the vast majority) of the country's residents and the direction of their spending.

2. Many authors have written about the displacement of cash by CBDC in the future (Hrytsai, 2023d, 2023e). Some wrote in a positive light about this course of events during the introduction of CBDC.

Mohammad Davoodalhosseini and Francisco Rivadeneyra noted in their article: “*One benefit of a CBDC could be to allow monetary policy to break below the effective lower bound (ELB). This would require removing cash or restricting cash holdings (e.g., removing large-denomination notes). But this alone would not be a sufficient condition to potentially realize the benefit of breaking below the ELB during downturns. [...] The caveats around the potential monetary policy benefits of a CBDC stem from knowledge gaps and implementation challenges. These include: questions about the feasibility and consequences of removing cash [...]*” (Mohammad Davoodalhosseini, Francisco Rivadeneyra, & Zhu, 2020).

*The hypothesis we put forward differs from the known ones, since we are talking about the displacement of CBDC not only by cryptocurrencies but also by the cash form of fiat money – and all of this has a reasonable basis.* In the text of the article, we have provided modern evidence with examples that the rumors about the so-called “cryptocurrency rollout” in third world countries are far from

groundless. So, as for the hypothesis we put forward, which is that the rise of the CBDC era will be followed by the rise of cryptocurrencies, we have actual examples of its current use in some countries.

For example, Ecuador has issued a ban on the circulation of all cryptocurrencies, except for the government-issued SDE token (in effect from 2014 to 2018) (“Cryptocurrency Regulations Around the World,” 2023). China, which is one of the leaders in the development and launch of its own CBDC, has introduced a complete ban on the circulation of cryptocurrencies.

In a 2022 study, the *Bank for International Settlements* recognizes the problem of loss of confidentiality and the possible use of the CBDC tool in political reprisals. And as an option, they offer one of the solutions to this problem.

Concerns regarding end users’ privacy within CBDC systems, and the trade-off with financial integrity, could be addressed with various legal, regulatory and technical choices. In CBDC systems where personal information (eg identity) is separated from transaction information, it may be easier to promote privacy, but adjustments in AML/CFT requirements may be required. For instance, it is possible that information on user identities would be gathered and stored only by PSPs, and that the central bank would not have any information on the identity of users in any specific transaction. If there were a need to collect such information, for instance for law enforcement purposes, there would need to be clearly delineated processes for doing so, similar to today’s bank secrecy laws. These features could help to safeguard against abuse of user data for political purposes (state surveillance), and to protect the operational independence of central banks from pressure by political authorities. In the case of insolvency of the financial institution with users’ identity information, it would still be necessary to transfer this information and account balances to a different provider. Legal and regulatory reforms could help to further protect CBDC end users and to combat money laundering and the financing of terrorism by specifying the conditions under which information could be used (Auer et al., 2022).

3. Summarizing the evolution of money forms, we can build a progressive series of them, which looks like the theory of the evolution of money forms over time: 1) metal money made of precious metal; where high-denomination metal money is made of precious metal and low-denomination metal money is made of non-precious metal; 3) metal money, usually not made of precious metal; 4) metal money made of non-precious metal and paper money backed by precious metal; 5) metal and paper money that do not have the actual value of the material from which they are produced (hereinafter referred to as classical fiat money); 6) classical fiat money and electronic money as an issuer's obligation to pay out classical fiat money (hereinafter referred to as electronic money); 7) classical fiat money, electronic money and, as an alternative to the latter, cryptocurrency (which is formally or informally given some of the functions of fiat money: exchange, payment, accumulation); 8) classical fiat money, CBDC (at this stage, electronic money, which has functions that duplicate CBDC, will disappear) and cryptocurrency (which will increasingly be used outside the law); 9) classical fiat money (limited version) and programmable CBDC, – at this stage, classic fiat money in the form of cash is likely to disappear, and cryptocurrencies will be outlawed in most countries.

**Conclusions.** From the above analytical material, we can draw a number of conclusions on the topic of our study:

1. Cryptocurrencies are a catalyst for innovation in classical finance and act as an experimental technological step, i.e. an evolutionary stage towards the main goal of the world's central banks – the introduction of programmable CBDCs. We have proved, based on the current financial and political trend, that the heyday of the CBDC era will be the beginning of the decline of the cryptocurrency era. This will be reflected in the fact that cryptocurrencies will be increasingly restricted in the world, until they are officially banned.

2. The benefits of implementing CBDCs for the state are enormous, to say the least: (a) *total income taxation*, (b) *total financial monitoring (public procurement, foreign investment, political*



party financing, etc.), (c) a political tool in the struggle for power, (d) but also an effective tool for reducing crime and corruption.

On the contrary, the benefits of CBDC for the population are negligible, compared to the current system of electronic money/transfers (instant transfer systems, bank cards, etc.), such as the high probability of a significant loss of classical constitutional rights and freedoms: (a) *loss of personal privacy*, (b) *limited political choice*, (c) *financial independence*, (d) *fiscal oppression*, (e) *negative interest rates*, and (f) *introduction of time value of money*.

3. CBDCs, in addition to the fact that they are likely to be granted the status of official money in the future, we believe that they should be prioritized from the perspective of legal regulation, – *as a big database*. Which will be presented in the form of state accounting records on who, where, when and how uses and stores money in a particular country.

4. CBDCs have the potential to become instruments of state coercion or censorship. Since the threat to classical constitutional rights and freedoms from CBDCs' properties begins with financial restrictions on an individual and his or her privacy, for example: the right to movement, to choose goods, to political views and their financing, and others.

The widespread introduction of CBDCs will have its own internal natural development, which is already evident in the form of a trend towards the study of programmable CBDCs. And this change in the form of money, as it has historically been at the dawn of monetary relations, will be dictated solely by the characteristics of the newest forms of programmable CBDCs that are attractive to states. In general, based on the characteristics that programmable CBDCs may have, for the state it is the strengthening of power in the form of total control in their countries; and for the population, it is the probability of losing a significant part of constitutional rights and freedoms.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-5>

## CONCEPTUAL AND THEORETICAL PROBLEMS OF ARTIFICIAL INTELLIGENCE IN LABOR LAW

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**Abstract.** This article is dedicated to exploring recommendations for the development of legal frameworks in labor law through the implementation of artificial intelligence based on the analysis of national legislation and global experience. Theoretical approaches to defining the essence of the concept of "artificial intelligence" are analyzed, providing a comprehensive interpretation of this concept. It is argued that the technological process of artificial intelligence is a current necessity in the legal system today, as the integration of artificial intelligence affects the work environment, the content of labor relations, and consequently, the need to revise certain norms of labor law to adapt to the changing reality. The impact of artificial intelligence on the formation of new legal institutions and sub-institutions in the future is investigated, such as working hours and labor standards, occupational safety, retraining, and qualification improvement, as well as the protection of personal data. The shifts that the technological process of artificial intelligence may induce in labor law are identified. The current legal status of Ukraine in the field of artificial intelligence is assessed, trends are explored, and the country's development prospects in this direction are determined. Key provisions of the artificial intelligence development strategy within the country are analyzed, and the roadmap for regulating artificial intelligence and specific initiatives for the development and application of artificial intelligence at the local level are evaluated. Based on the synthesis of findings, practical recommendations.

**Key words:** artificial intelligence, labor law, working hours, robotics, employment, wage labor, employers, technological process.

**Introduction.** Today, observing the current trends in the development of modern society, clear tendencies towards the growth of areas where artificial intelligence is applied can be noted. This is provoked by the fact that, while performing multifaceted tasks delegated by humans, artificial intelligence autonomously engages in social relations, often becoming an integral part of them. A common regularity is that artificial intelligence can be utilized in various fields to create and implement new human capabilities, aiming to free individuals from monotonous, routine work through the automatic generation of software. It is employed for the automation of various activities, including legal ones, decision support, and the development of communication processes.

According to analysts from the leading consulting company McKinsey, the development of artificial intelligence is currently one of the defining business opportunities for leaders. Entrepreneurs who can compete in the "data era" and whose employees can effectively utilize artificial intelligence are the ones who will succeed. Ideally, an organization should be fully based on artificial intelligence and constantly evolve to be a leader in the competitive landscape (Brown, Solly, Darshit Gandhi, Louise Herring, Ankur Puri, 2020: 91). According to analytical data, the issue of artificial intelligence is currently relevant in the labor market and requires a profound approach in labor law. Therefore, it is necessary to introduce these concepts into labor legislation.

**Analysis of recent research and publications.** The research on the general aspects of legal regulation and application in the field of artificial intelligence involves the contributions of O. Baranova, T. Katkova, M. Karchevsky, K. Khernes, S. Petryaev, O. Radutny, Y. Sidorchuk, A. Sulina,

E. Kharitonov, O. Kharitonova, V. Furashev, O. Yastrebov, and others. Foreign scholars such as Stone, Peter, Rodney Brooks, Erik Brynjolfsson, Ryan Calo, Oren Etzioni, Greg Hager, Julia Hirschberg, Shivaram Kalyanakrishnan, Ece Kamar, Sarit Kraus, Kevin Leyton-Brown, David Parkes, William Press, AnnaLee Saxenian, Julie Shah, Milind Tambe, Astro Teller (Stone, Peter, Rodney Brooks, Erik Brynjolfsson, Ryan Calo, Oren Etzioni, Greg Hager, Julia Hirschberg, Shivaram Kalyanakrishnan, Ece Kamar, Sarit Kraus, Kevin Leyton-Brown, David Parkes, William Press, AnnaLee Saxenian, Julie Shah, Milind Tambe, Astro Teller, 2020).

The impact of robots on employment in the EU is explored in the publication by F. Chiacchio, G. Petropoulos, and D. Pichler (Chiacchio F., Petropoulos G., & Pichler D., 2018: 3–6). The necessity of incorporating non-traditional employment, based on internet platforms' use of robot recruiters, into labor law regulation is highlighted in works (De Vos, Marc, 2020: 8).

However, a significant number of problems regarding the integration of artificial intelligence into labor law remain inadequately addressed and insufficiently explored. Given the absence of legal regulation in the field of artificial intelligence, it is crucial to clarify the conceptual basis for the formation of a normative legal framework regarding the use of artificial intelligence in labor law.

**The article's purpose** – investigate the essence of artificial intelligence and its primary implementation tools, analyze the trends in the impact of the technological process of artificial intelligence on the sphere of work, and propose necessary pathways for transformative changes in the legal reality of artificial intelligence within the legal field of labor law.

**Research methodology.** To write the article, primary sources were worked out, including international acts and the legislation of Ukraine. The article analyzes the scientific works of foreign and Ukrainian authors, which are devoted to certain aspects of the investigated problem. In carrying out the research, the authors used the Aristotelian (philosophical) method and general scientific methods (systemic, structural-functional, ascent from the concrete to the abstract, ascent from the abstract to the concrete). Considering the article's topic, the author used special (developed by non-legal sciences, in particular, analysis of written sources) and separate (developed by legal sciences: dogmatic method, methods of interpreting legal norms) methods. The basis of the research was the dialectical method, which made it possible to analyze the topic holistically and determine the primary forms of promoting impact of artificial intelligence on the field of work. When writing the article, the comparison method was used, which made it possible to necessary ways of transformational changes in the legal validity of artificial intelligence in the legal field of labor law.

The scientific research was carried out in several stages, considering the volume of the studied material and the need to justify the conclusions drawn. In the first stage, the analysis of scientific works of foreign and Ukrainian scientists, as well as other published materials, was carried out. In the second stage, how the field of hired labor is changing with the introduction of artificial intelligence. At the third stage, an attempt is made to reveal the impact of the use of artificial intelligence in labor law, and problems that require drastic changes in institutes and sub-institutes of labor law.

**Presenting main material.** In the era of global changes, digital technologies and their corresponding societal and regulatory legal relations are rapidly evolving. The introduction of artificial intelligence is transforming the field of wage labor. Employers face the challenge of ensuring continuous learning and intellectual adaptation of their personnel, initiated by the differences in the functioning of social environments between technical tool developers and their users based on artificial intelligence models (Oliinyk T.I., Krupska K.A., 2022: 2).

It is believed that the examination of artificial intelligence should begin with clarifying the essence of the term. The British encyclopedia defines artificial intelligence as the "ability of a digital computer or robot controlled by a computer to perform tasks commonly associated with intelligent beings" (Britannica Dictionary. Artificial intelligence). At the same time, Collins Dictionary considers artificial intelligence as a "type of computer technology that is aimed at making machines work in a

smart way, similar to how the human mind works" (Oxford English Dictionary (OED). Artificial intelligence).

Since the inception of the concept of "artificial intelligence," many scholars and practitioners have contributed their interpretations to this category. Among the numerous interpretations, attention is given to the definition proposed in the resolution of the European Parliament. Artificial intelligence is a "smart robot" that possesses the following characteristics: autonomy through sensory sensors and/or data exchange; autonomous learning from experience or interaction; minimal physical support; adaptation of behavior models to the environment; and is non-living in a biological sense. (European Parliament resolution of 16 February 2017 with recommendations to the Commission on Civil Law Rules on Robotics, 2017: 24).

According to the conclusions of ITU (2018), artificial intelligence encompasses five types of technologies: computer vision, speech synthesis, virtual assistants, automated (robotic) work, and contemporary machine learning. By 2030, 70% of companies are expected to use at least one of these technologies (Assessing the Economic Impact of Artificial Intelligence, 2018: 29). The essence of artificial intelligence is quite clearly formulated by the European Parliament and the Council of the EU, which, on December 8, 2023, adopted the world's first regional regulatory act on artificial intelligence, the Artificial Intelligence Regulation, also known as the AI Act. It states that an artificial intelligence system is a machine system designed to operate at various levels of autonomy and is capable, with or without explicit intent, of generating results such as forecasts, recommendations, or decisions that impact the physical or virtual environment. This definition aligns with the formulation proposed by the Organization for Economic Cooperation and Development (OECD) in 2019.

With greater detail, Ukraine has formulated its position on artificial intelligence, presenting a roadmap for regulating artificial intelligence and specific initiatives for the development and application of artificial intelligence at the local level in October 2023. The strategy of the document is aimed at: supporting business competitiveness and ensuring access to global markets; building Ukraine's brand as a digital nation in the field of artificial intelligence; protecting human rights from the risks of developing and using artificial intelligence systems; creating and supporting a culture of collaboration and self-regulation in the field of artificial intelligence in Ukraine; integrating into the European market and implementing EU standards as part of Ukraine's overall Eurointegration path.

An analysis of the key provisions of the strategy regarding the labor market, comparing it in this aspect with foreign counterparts, and examining the existing practices of transforming wage labor will allow for a more precise determination of the direction of labor law changes in Ukraine and globally.

The results of the research suggest that artificial intelligence is nothing but electronic (computer) technology widely used in the work process, altering its methodology. This technology embodies scientific principles, methods, ways, and the sequence of performing labor operations. Additionally, artificial intelligence can apply this knowledge to address new tasks similarly to humans. The technological process comprises a set of technological operations that reflect the interaction between equipment and technology.

Consequently, the work process encompasses the technological process, determining the way in which tools impact labor. It can be concluded that labor relations are a societal form of development for both the work process and the technological process. Artificial intelligence technology, which should exhibit signs of intelligence, can effectively respond to human language, recognize information, and make decisions based on data, finding solutions to the tasks presented to it.

It is necessary to note that the technology of the artificial labor process will lead to a significant increase in the share of past labor embodied in robotics, and human intellect will be maximally replaced by artificial intelligence.

As productivity increases with the use of robotics, conditions will emerge in which more past labor will be applied in the work process compared to living labor, and in terms of quantity, artificial intel-

ligence will surpass human labor. However, even in this scenario, humans will retain the function of controlling automated production to monitor artificial intelligence.

Consequently, changes will occur in labor relations. The primary form of labor relations will be the relationship to work. As the ratio between living and past labor shifts in favor of the latter, there arises a need for a significant increase in the quality of "living labor." The reduction in the quantity of "living labor" in favor of past labor embodied in artificial intelligence must be compensated by an increase in the quality of "living labor" to match the quantity and quality of this past labor. In other words, for a smaller amount of "living labor" to be able to support the functioning of a larger amount of past labor, it must be of higher quality.

It is primarily about high-quality professional skills of workers, an increase in the quality of their qualifications, and intellectual abilities. Workers with new professions, such as electronics technicians, digital machine operators, and the presence of computers in the workplace, will be required. All of this necessitates the development of a creative and analytical approach to work.

On the other hand, the operation of artificial intelligence systems in the workplace creates a problem of causing harm to human life and health, leading to the question of responsibility for the damage inflicted by these systems. The incorporation of an incorrect algorithm into the artificial intelligence system can result in substantial losses. At the same time, the employer is obligated to ensure that the workplace, equipment, and processes are safe and pose no risk to the health of employees. Necessary measures must be taken to minimize corresponding risks.

However, the mere use of artificial intelligence systems and robotics should not be a basis for imposing regulatory restrictions. Robotic devices are merely objects that can be operated by their users in any way that does not violate the law. Even if we assume that artificial intelligence, at a certain stage of its development, gains consciousness and forms its own interests, its constructive features and thinking apparatus would be so different from human attributes that differences in worldview and ethics between a robot and a human would be equally fundamental. The results of such an analysis aim to lay the foundation for the ethical and legal aspects of the artificial intelligence industry.

Such a situation has the potential to lead to a serious social conflict if the ethical and value systems embedded by manufacturers in the functioning of robots significantly differ in certain aspects from the values adhered to by the majority of society. To prevent such a scenario, some countries are already taking steps to regulate the ethical aspects of the development and use of artificial intelligence technologies.

Additionally, due to the autonomous and possibly unpredictable behavior of robots, individuals working alongside robotic machines may experience new forms of stress and risks to mental health (known as robot-induced stress). Employers are obligated to take measures to mitigate these risks. Workers collaborating with robots and algorithms should undergo proper training on new equipment and algorithms.

The interactions between humans and robots, facilitated by certain analytical tools, provide employers with the ability to model behavior. This includes limiting tasks that robots can perform, improving the list of tasks exclusively performed by humans, anticipating new rules for the interaction between human workers and robots in shared tasks, adjusting job quotas, and updating health and safety laws to account for injuries caused by robotics.

In summary, addressing the ethical and psychological implications of artificial intelligence in the workplace is crucial to avoid potential conflicts and ensure the well-being of individuals working alongside intelligent machines. It involves regulatory frameworks, proper training, and continuous adaptation of laws to safeguard the health and safety of workers.

In the process of such interaction, the collaboration between robots and humans, facilitated by specific analytical tools, provides employers with the ability to model behavior. This includes restricting tasks that can be performed by robots, enhancing the list of tasks exclusively carried out by



humans, anticipating new rules for the interaction between workers and robots in tasks where their work is collaborative. There is a need to adjust job quotas, and health and safety laws must be updated to account for injuries caused by robotics.

One of the threats associated with the integration of artificial intelligence into the workforce is that employers may arbitrarily replace workers with artificial intelligence systems. This is driven by the pursuit of competitive advantages through the rapid implementation of technological advancements aimed at displacing human labor by employers.

Another issue with artificial intelligence is direct and indirect workplace discrimination. This is related to the use of artificial intelligence in the hiring process because, unlike humans, artificial intelligence can review databases and resumes much faster and cheaper. However, in recent years, human bias has been present in hiring decisions. Employers using artificial intelligence in hiring must ensure that future employees are protected from bias or any form of discrimination.

On the other hand, the effectiveness of applying artificial intelligence bots is evident in the analysis of video and audio to assess candidates' skills and suitability for a role. This system also utilizes resumes and online sources to identify the best candidates for open positions, even if they are not actively job hunting. Implementing external recruiting based on artificial intelligence helps to make the process faster, smarter, and more time-efficient. Employers primarily do this to enhance the qualifications of future hires, reduce time and costs associated with the hiring process, and optimize candidate selection opportunities.

Researchers in the field of labor law objectively focused their attention on the need to include non-standard employment based on internet platforms in the scope of labor regulation (De Vos, Marc, 2020: 14). This includes the use of robot recruiters, programs for the intelligent analysis of data obtained through monitoring of employees, enhancing the quality of employee assessment in favor of the employer (De Stefano, Valerio, 2018: 3). Another issue at the legislative-institutional level, in the context of the workplace, is personal data related to employees, their personnel records, previous work results, etc. Artificial intelligence technologies must adhere to data protection legislation, which defines the rights and obligations of employers and employees.

Furthermore, there remains an issue with data protection between the employer and the employee, as well as surveillance in the workplace. When implementing a surveillance system at work, the employer must respect the confidentiality of the employee, and the employee should be informed about the surveillance in advance. Any use of artificial intelligence that deserves trust and respects human rights and democratic values will ensure compliance with the supremacy of the law, human rights, and democratic values throughout the entire lifecycle of the artificial intelligence system. Postulates that should be adhered to when using artificial intelligence include freedom, dignity, and independence, confidentiality and data protection, absence of discrimination and equality, diversity, justice, social justice, and internationally recognized labor rights.

**Conclusions.** In conclusion, it should be noted that, the penetration of artificial intelligence into the sphere of work leads to the transformation of labor legislation. The global challenges of society highlight that if legislation wants to maintain relevance, it will need to quickly adapt to new tasks (Stone, Peter, Rodney Brooks, Erik Brynjolfsson, Ryan Calo, Oren Etzioni, Greg Hager, Julia Hirschberg, Shivaram Kalyanakrishnan, Ece Kamar, Sarit Kraus, Kevin Leyton-Brown, David Parkes, William Press, AnnaLee Saxenian, Julie Shah, Milind Tambe, Astro Teller, 2020: 45). The generalization of research on the use of artificial intelligence in labor law allows identifying challenges that will require fundamental changes to the following institutes and sub-institutes of labor law: working hours and labor norms (protecting workers from overwork due to the pace of work that does not require breaks) (Levytska N.O., 2023: 107); occupational safety (the need to introduce safety standards when working collaboratively with humans and robotics, the issue of reducing the level of psychosocial risks for workers to account for injuries caused by robotics, employer responsibility for adverse consequences



even if it's due to the worker when the employer uses artificial intelligence to monitor the employee); retraining and upgrading of employee qualifications, high-quality professional abilities of workers, and the growth of their qualifications and intellectual abilities.

Guarantees and compensation for employees (in the case of termination due to replacement by artificial intelligence systems); protection of personal data, employee confidentiality, as well as awareness of surveillance; limiting the use of artificial intelligence in employment; developing regulatory frameworks for ethical aspects of the development and use of artificial intelligence technologies in labor law.

The transformation of labor legislation is also influenced by the study of foreign experience in legislative work related to artificial intelligence. The analysis will help identify the strengths and weaknesses of various regulatory strategies and avoid certain controversial decisions made by discoverer in this field. Timely responses to new challenges in society will further enhance the positive impact of legal regulation on social relations and increase the effectiveness of labor law.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-6>

## SPECIFIC FEATURES OF LEGAL REGULATION OF GREEN INVESTMENTS IN UKRAINE<sup>1</sup>

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**Abstract.** It is established that Ukraine has begun to develop legislation on legal regulation of green bonds since 2020, which are the financial instrument of green investment in accordance with European standards. However, the Law of Ukraine “On Investment Activity” does not contain norms that would regulate various legal relations associated with green investments. Green bonds are the new subtype of securities in Ukraine, since the legislation on capital markets did not provide the existence of such securities until 2020.

It is emphasized that issues concerning the status, problems and perspectives of legal regulation of green investment; legal nature of green investment relations; specific features of the elements of legal relations on green investment; liability for non-fulfillment or improper fulfillment of obligations by legal relations participants in green investment; content of the notion of green investments; forms of existence of green investments are poorly studied at theoretical and legal level. Besides, there is no common opinion among scholars in defining the content of the concept of “green investments”.

Participants of investment legal relations in the field of green investment are classified into two groups: 1) a person implementing an environmental project and 2) a person providing finances for an environmental project. The legislator did not limit the possibility of acquiring the status of a person who implements an environmental project or a person who provides finances for an environmental project exclusively to subjects of private or public law. On this basis, we can talk about the mixed legal nature of relations in the field of green investment.

It has been identified that green bonds are one of possible green investment instruments, but not the only one.

The author has offered the definition of the concept of “green investments”, which should be understood as a set of property and intellectual values that have a price impact and are placed by the subjects of investment activity in an environmental project, with the aim to achieve an ecological and social effect and profit.

**Key words:** investments, green investments, green bonds, investment activity, subject of investment activity, investment legislation, state support.

**Problem’s setting.** Ukraine adopted the green investment development vector in accordance with European standards. The European Green Deal of 11 December 2019 (The European Green Deal, 2019) highlighted the need to better financial and capital flows orientation into environmental investments. Deterioration of the natural environment became the reason for the development of green policy to protect and improve the quality of the environment. Section 1 of the Law of Ukraine “On Basic Principles (Strategy) of the State Environmental Policy of Ukraine for the Period by 2030” (On Basic Principles, ..., 2020) notes that globalization and social transformations processes have increased the priority of environmental protection, and therefore require Ukraine to take urgent measures. The economic development of the state has been accompanied for a long time by unbalanced exploitation of natural resources, low priority of environmental protection issues, which made it impossible to achieve balanced (sustainable) development. Ukraine has begun to develop legislation on legal regulation of green bonds since 2020, which are the financial instrument for green investment, however, it is worth noting that the following issues are poorly studied:

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<sup>1</sup> The manuscript was prepared within the project "Relevant Problems and Development Perspectives of Private International Law Within Modern Conditions", funded by the Academy of Finland (358210) and supported by the Academy of Finland funded research project "Shaping, fixing and making markets via IPR: regulation of sustainable innovation ecosystems" (SHARE) (332326)

- status, problems and perspectives of legal regulation of green investment;
- legal nature of green investment relations;
- specific features of elements of legal relations on green investment;
- liability for non-fulfillment or improper fulfillment of obligations by participants in green investment legal relations;
- content of the concept of green investment;
- forms of existence of green investments.

The Law of Ukraine “On Investment Activity” (1991) does not contain norms aimed at regulating the research issue.

The war in Ukraine has disrupted global energy markets and exposed a structural energy crisis that has been underway for decades (SEB’s Green Bond Report..., 2022). The strategy of the state environmental policy of Ukraine for the period by 2030 (The strategy of the state..., 2020) was developed in the pre-war period in 2020. The war in Ukraine has worsened the situation of the environment and energy infrastructure. It is currently difficult to talk about the possibility of implementing this strategy. Ukraine suffered great ecological losses: burned forests, blown up dams and hydroelectric power plants, destroyed power plants. The state needs significant investments during the post-war period precisely for restoration. National investors cannot cover the need for investments, and Ukraine does not have an attractive investment potential for foreign investors. The reason for this is imperfect legal regulation, the lack of real guarantees for foreign investors and lack of trust among foreign investors. Everything specified characterizes the relevance of studying the specifics of legal regulation of green investments in Ukraine. Therefore, studying the status and problems of legal regulation of green investment in Ukraine is a topical issue.

**Analysis of recent research and publications.** The works of economic, theoretical and legal orientation are focused on the scientific understanding of green investments. Theoretical and legal regulation of green investments in Ukraine was studied by O.M. Shumilo (Shumilo, 2015), Yu.M. Zhornokui (Zhornokui, 2015), T.S. Novak and V.O. Melnyk (Novak, Melnyk, 2021), A.Yu. Frolov (Frolov, 2019), M.M. Kuzmina (Kuzmina, 2020). The value of green investments in economic activity was studied within economics area by: S.V. Arestov (Arestov, 2008), Yu.V. Vikhort (Vikhort, 2018), S. Kharichkov, N. Andreeva (Kharichkov, Andreeva, 2010), T.V. Pimonenko (Pimonenko, 2019).

The analysis of modern scientific papers focused on studying certain aspects of legal regulation of green investments allows us to argue that appropriate attention is not currently paid to the research of problems arising in this area.

**The purpose of the article** is to study specific features and problems of legal regulation of green investments in Ukraine.

**Main part.** The Article 9 of Regulation (EU) 2020/852 of the European Parliament and of the Council of 18 June 2020 on the establishment of a framework to facilitate sustainable investment (Regulation (EU) 2020/852, 2020) contains six environmental objectives: 1) climate change mitigation; 2) climatic change adaptation; 3) the sustainable use and protection of water and marine resources; 4) the transition to a circular economy; 5) pollution prevention and control; 6) the protection and restoration of biodiversity and ecosystems.

Achieving the set objectives is possible by attracting “green investments”. The European Union Regulation 2020/852 on the establishment of a framework for the promotion of sustainable investments defines such investments as “environmentally sustainable investments” (Article 2 of Regulation (EU) 2020/852, 2020).

The Law of Ukraine “On Investment Activity” does not currently define the content of the concept of “green investment”, specific features of legal regulation of green investments and the specifics of the legal status of the participants in investment legal relations in the field of green investment. The

concept of green investments has a wide meaning and is considered at theoretical and legal level as “green finances”, “environmental investments”. It is worth supporting the opinion that, despite the use of the term of “green investments” in Western scientific literature, the understanding of the essential content of this category is actually absent in domestic science (Kharichkov, Andreeva, 2010: 17).

Attracting green investments in Ukraine takes place with the use of securities – green bonds. The use of green bonds is a novelty of Ukrainian legislation and was reflected for the first time at the legislative level in 2020 in the Law of Ukraine “On Amending Certain Legislative Acts of Ukraine on Simplifying Investment Attraction and Introducing New Financial Instruments” (On Amending Certain Legislative Acts..., 2020). This Law introduced a new type of financial instruments in Ukraine – green bonds and established rules for the participants of the relevant market. The existence of such a subtype of securities as green bonds was not provided by the legislation on capital markets until 2020.

Legal regulation of green bonds is being developed both at the European and Ukrainian legislative levels. The European Green Deal Investment Plan (Commission Communication..., 2020) of 14 January 2020 announced that the Commission would introduce the EU Green Bond Standard (The EU Green Bond Standard, 2019). Thus, the key features of green bonds are defined by the European Union Green Bond Standard (EU GBS) and the Green Bond Principles of the International Association of Capital Markets (GBP) (Green Bond Principles, 2021).

The development of the green bond market in Ukraine is consistent with European norms and includes: reorientation of capital flows to sustainable investments to achieve sustainable and inclusive growth, management of financial risks arising from climate change, resource depletion, environmental degradation and social problems, stimulation of transparency in finances and economics in the whole with a focus on long-term profits (The Commission approved recommendations, 2021).

Taking into account the specified environmental objectives, the Decision of the National Securities and Stock Market Commission (NSSMC) approved the Recommendations on implementing or financing environmental projects through the issuance of green bonds (On Approval of Recommendations for the Implementation..., 2021), amended the Law of Ukraine “On Securities and Stock Market” and approved the Concept on the introduction and development of the green bond market in Ukraine (On Approval of Recommendations..., 2022). These Recommendations approved the key features of the model of green bonds issued in Ukraine:

- compliance of the project, for which funds are raised through the issuance of green bonds, with internationally recognized taxonomy,
- target-oriented use of proceeds from the placement of green bonds,
- the issuer’s reporting on the impact of these projects on the environment,
- involvement of external independent controller (verifier) by the issuer,
- own policy of the issuer regarding green bonds.

Thus, the issuer of green bonds must ensure the proper fulfillment of all key features. It contributes to the protection of investors’ interests and the growth of investments into green bonds. Non-compliance with at least one of the specified features is the reason not to classify bonds as green ones. An attempt to classify bonds as green ones when they do not comply with key features gives reason to regard this as “greenwashing”. Green camouflage is a deliberate mislead of investors and state authorities in regard to the directions of using the amount of financial funds received from the issuance of green bonds. In order to prevent the facts of “green camouflage”, there was a need to develop international standards and to form countries’ own recommendations (On Approval of Recommendations for the Implementation..., 2021).

The issue of relations’ parties on green investment is important. Participants of investment legal relations in the field of green investment with the usage of the mechanism of green bonds can be classified into two groups: 1) a person implementing an environmental project and 2) a person providing finances an environmental project.



Green bonds according to the Art. 18 of the Law of Ukraine “On Securities and Stock Market” (2006) can be issued by a person implementing or providing finances an environmental project. Funds from green bonds placement are directed to financing and / or refinancing the costs for an environmental project. If the issuer of green bonds is the state of Ukraine, funds from their placement are used in accordance with the Budget Code of Ukraine. For example, it is stated in the literature that the main issuers of such bonds are such international financial organizations as the European Bank for Reconstruction and Development, the World Bank, the European Investment Bank, the International Finance Corporation, as well as private corporations (Unilever, Toyota). The buyers of such securities are usually institutional investors who demonstrate the social responsibility of own business (Kuzmina, 2020: 195).

*The person implementing an environmental project is recognized as:*

- the Council of Ministers of the Autonomous Republic of Crimea, a territorial community acting by a representative agency of local self-government, if there is a decision on the implementation of an environmental project, – as of the effective date of such a decision;
- the state of Ukraine acting by the authorized agencies, if there is a decision on the implementation of an environmental project or a state target-oriented program on implementing environmental (green) investments, – as of the effective date of such a decision;
- a legal entity of private law, including within the projects implemented in accordance with a public-private partnership agreement.

There is a ban for a person implementing an environmental project, for the financing of which green bonds were issued, to take any actions that may result in early termination, cancellation or other loss of rights to the environmental project and / or encumbering them (Part 4 of the Art. 18 of the Law of Ukraine “On Securities and Stock Market”, 2006).

*The person providing finances for an environmental project is recognized as:*

- a specialized financial institution established by the Cabinet of Ministers of Ukraine or by another specially authorized agency – in the manner and under the procedure outlined by the law determining its legal status;
- a legal entity under private law, in particular a bank, another financial institution;
- international financial organization.

A person providing finances for an environmental project can issue one turnout of green bonds to finance several environmental projects.

The duty to ensure the target-oriented use of revenues raised from investors for financing and / or refinancing the costs of an environmental project is entrusted by the legislator to a person implementing or providing finances for an environmental project (Part 6 of the Art. 18 of the Law of Ukraine “On Securities and Stock Market”, 2006).

As one can see, the legislator did not limit the possibility of acquiring the status of a person implementing an environmental project or a person providing finances for an environmental project exclusively to subjects of private or public law. On this basis, one can talk about the mixed legal nature of relations in the field of green investment.

Talking about the procedure for the selection and monitoring environmental projects financed from state and local budgets, this aspect is regulated taking into account the requirements of the Law of Ukraine “On Government Aid for Business Entities” (2014). The key point is the compliance of projects financed / refinanced with funds from the placement of green bonds with the Taxonomy for Sustainable Activities.

The issue of “green” bonds can become a promising instrument for attracting funds for the post-war reconstruction of cities. There are successful examples of issuing “green” bonds in Ukraine. National Energy Company “Ukrenergo” issued “green” bonds worth \$ 825 million in 2021, and despite the martial law in 2022, it made the first interest payment of \$ 28.4 million on these securities (Green Finance for the Reconstruction..., 2022).



The definition of the concept of “green bonds” is enshrined in Part 5 of the Art. 11 of the Law of Ukraine “On Securities and Stock Market” (2006). Green bonds are bonds, whose circular note (decision on issue, and for state bonds of Ukraine – placement conditions) provides the use of the funds raised exclusively for financing an environmental project or its certain stage. At the same time, an environmental project is a project in the field of alternative energy, energy efficiency, minimization of generation, utilization and processing of waste, introduction of environmentally friendly transport, organic farming, preservation of flora and fauna, water and land resources, adaptation to climate changes, as well as another project aimed at protecting the natural environment, implementing ecological standards, reducing emissions into the natural environment (Part 2 of the Art. 18 of the Law of Ukraine “On Securities and Stock Market”, 2006).

It is believed that the definition of the terms of “green bonds” and “environmental project” need to be revised. In our opinion, the definition stipulated in Part 5 of the Art. 11 of the Law of Ukraine “On Securities and Stock Market” does not fully reveal specific features of green bonds: “green bonds are bonds...”. We note that the conceptual and categorical apparatus must be clear at the level of the law and must reveal the essence of a certain phenomenon with a detailed characteristics. Dual understanding of the same phenomenon will be impossible under such grounds, as a result, the norm of law will be applied incorrectly and subjects of the relevant relations will be deprived of the opportunity to abuse the rights. This statement is also applied to the definition of the content of the term of “environmental project”. In fact, the legislator does not reveal the content of the concept, but indicates the types of ecological areas that require investment. It is important to note in terms of the imperfect conceptual and categorical apparatus that any legal relations can be developed, if there is proper legal regulation.

Thus, the policy aimed at the development of green investments in Ukraine was introduced through the development of the mechanism of legal regulation of financial instruments – green bonds. It is worth paying attention to the fact that the Art. 1 of the Law of Ukraine “On Investment Activity” (1991) provides other values that can be an investment. Thus, investments are all types of property and intellectual values invested into objects of entrepreneurial and other types of activity, as a result of which profit (income) is created and / or social and environmental effect is achieved. And such values can be: funds, target-oriented bank deposits, shares, stocks and other securities (except promissory notes); movable and immovable property (houses, buildings, equipment and other tangible assets); property rights of intellectual property; a set of technical, technological, commercial and other knowledge, formalized in the form of technical documentation, skills and production experience necessary for the organization of any type of production, but not patented (“know-how”); rights to use land plots, water, resources, houses, dwellings, equipment, as well as other property rights; other values (the Art. 1 of the Law of Ukraine “On Investment Activity”, 1991). Thus, it is believed that green bonds are not exclusive instrument of green investment, but are one of the possible values that have the nature of investment in accordance with the current investment legislation.

There is still no common approaches to the conceptual and categorical apparatus of green investment among scholars in regard to the definition of the content of the concept of green investments. Scholars consider the concept of green investments as a set of tangible and intangible values, as a form of international trade in emissions, etc.

S. V. Arestov claims that environmental investments are the product of co-evolution of commercial and environmental goals of an enterprise and defines them as types of property and intellectual values invested into objects of entrepreneurial and other types of activity, which result in the formation of ecological, economic and ecological, environmental and social effect (Arestov, 2008: 3).

Thus, Y. V. Vikhort defines green investments as a form of international trade in emissions, which involves the further investment of funds received from the implementation of quotas for projects and measures to reduce emissions at other environmentally hazardous objects (Vikhort, 2018: 7).

T. V. Pimonenko considers green investments as property and intellectual values oriented on resource-saving, as well as ecologically safe tangible and intangible assets, green financial instruments, measures to create an eco-conscious internal corporate and market environment with the aim of obtaining explicit and latent economic, ecological and social effects (Pimonenko, 2019: 9).

M. M. Kuzmina calls green bonds as one of the forms of environmental taxation around the world. They are the debt instrument, the funds from the sale of which are directed to financing “green” environmental projects, both new and existing ones. The scholar singles out the following types of bonds: 1) standard (Green Use of Proceeds Bond) – a standard debt obligation with the right of recourse to the issuer, who is obliged to inform the investor about deposits areas; 2) bonds secured by profit (Green Use of Proceeds Revenue Bond) – a debt obligation without recourse to the issuer, the credit position is secured by the profit from the investment project, about which the investor must be informed; 3) project bonds (Green Project Bond) – the investor bears the direct credit risk of financing a certain project; 4) securitized bonds (Green Securitized Bond) – a debt obligation secured by one or more green investment projects that are already profitable (Kuzmina, 2020: 195).

S. K. Kharichkov equates the term of “green investments” with the term of “environmental investments” in terms of considering the development priorities laid down in the “green economy” strategy, which are defined as investments into a wide range of environmental and socio-economic orientation: reduction and cessation of negative anthropogenic impact on the environment; preservation, improvement and rational use of the natural and resource potential of territories, ensuring environmental safety in the country, as a result of which ecological, social, economic and political results are achieved (Kharichkov, Andreeva, 2010: 17).

O. M. Shumilo defines ecological (green) investments in the form of international and now national system of trading emission quotas as an effective mechanism for reducing greenhouse gas emissions (Shumilo, 2015: 84).

As one can see from the specified scientific points of view, any author does not consider green investments exclusively through the instrument of green bonds. In our opinion, green bonds are one of the possible green investment instruments, but not the only one. It is believed that green investments are a set of property and intellectual values having a price impact and placed by the subjects of investment activity into an environmental project with the aim of achieving an ecological and social effect and profit. It is also important to note that the Law of Ukraine “On Investment Activity” (1991), when defining the content of the concept of investments, indicates the environmental and social effect as a result of investments, but does not reveal these concepts.

The ecological effect should be related to the development of certain areas in the green economy.

O. M. Shumilo refers to such areas: increasing the energy efficiency of old and new buildings; transition to alternative energy sources (wind, sun, biomass, geothermal one); increasing confidence in the balanced development of transport; stimulation of the planet’s ecological infrastructure, including drinking water, forests, soils, reefs; support for sustainable agriculture, including organic production (Shumilo, 2015: 293–294).

The social effect, in our opinion, is the result of investments placement, which can be expressed in improving the natural environment, the health situation of the population, the quality of food products, the standard of living of the population, the creation of new job places and social security of the population. Social effect and environmental effect are interrelated results of investment activities, especially when investing into environmental projects.

**Conclusions.** On the basis of the conducted research, it is possible to state the lack of common scientific approaches in defining the concept of “green investments” and the lack of definition of the content of this term at the national legislative level.

It has been established that the attraction of green investments in Ukraine takes place with the use of securities – green bonds. The use of green bonds is a new law in Ukraine and was first enshrined at

the legislative level in 2020 in the Law of Ukraine “On Amending Certain Legislative Acts of Ukraine on Simplifying Investment Attraction and Introducing New Financial Instruments”.

We believe that green bonds are not an exclusive instrument of green investment, but are one of the possible values having the nature of investments in accordance with the current investment legislation.

It has been noted in regard to the participants in green investment relations that the legislator did not limit the possibility of acquiring the status of a person implementing an environmental project or a person providing finances for an environmental project exclusively to subjects of private or public law. On this basis, we can talk about the mixed legal nature of relations in the field of green investment.

The concept of “green investments” has been offered to understand as a set of property and intellectual values having a price impact and are placed by the subjects of investment activity into an environmental project with the aim of achieving an ecological and social effect and profit. It is also important to note that the Law of Ukraine “On Investment Activity” while defining the content of the concept of investment indicates the environmental and social effect as a result of investments, but does not reveal these concepts.

The study of existing works, where the problems of legal regulation of green investments were the subject matter of their research, gives reason to state that the works of scholars are mainly oriented on studying financial instruments of green investment – green bonds. The study of specific features of the mechanism of legal regulation of green investments has a fragmentary nature and is a perspective area for further scientific works.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-7>

## THE EVOLUTION OF REGISTRATION SYSTEMS IN UKRAINE: INTERNAL AND EXTERNAL PERSPECTIVES<sup>1</sup>

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**Abstract.** The article explores the impact of technological advancements on the development of the legislative framework regulating registration systems in Ukraine. In the context of the transition from traditional to digital approaches, combining existing management practices with innovative solutions became particularly important. Also, the success of digitalization depends on the effectiveness of cyber security measures.

Adaptation to technological change has been proven to be key to achieving strategic goals from a legal perspective. Phased implementation of changes is an important stage of sustainable and effective development of registration systems in Ukraine which will allow all participants in the process to adapt to new stages of digital development, and the use of pilot projects helps to inform strategic decisions in a rapidly changing technological environment.

The article summarizes that the development of technologies and digital transformation requires not only technical solutions but also new legal strategies to ensure the effective and safe functioning of registration systems in the modern world.

**Key words:** registration systems, administrative procedures, administrative service, digital technologies, interaction systems, pilot project.

**1. Introduction.** Every legal system, including Ukraine, actively uses technological advancements to create appropriate registration systems. For example, using database interoperability software allows multiple users to use modern registration systems. This process is based on interaction between the legal system and existing information management systems.

In the modern period, Ukraine faces significant challenges arising from the ongoing military conflict initiated by the Russian invasion on February 24, 2022. At the same time, obtaining the status of a candidate for joining the European Union in June 2022 turned out to be a strategically important moment for the country. These events are a catalyst for the development of ideas and the approval of innovative solutions for the optimal functioning of registration systems in conditions of geopolitical changes and internal transformations.

Commission Staff Working Document “Ukraine 2023 Report” accompanying the document Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee, and the Committee of the Regions dated November 8, 2023, is an orientate for further development of Ukraine, in particular in the field of digital transformation.

According to the report, digital technologies have reached a high level, with the approval of the Administrative Procedure Law in May 2022 (Law № 2073-IX) being a significant step in the right direction. The law harmonized disparate administrative procedures in different sectors of public administration. Due to the war, special access features to unify state registers were established, and restrictions on access to public information were imposed for security reasons.

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<sup>1</sup> This article was written while completing a postdoctoral internship at the Faculty of Law of the University of Toronto. I want to thank Professor Mariana Mota Prado for valuable discussions in the formulation of this article and for reading and commenting on the final draft of this note.

The report also emphasizes the success of offline administrative service centers, despite war damage, thanks to their offices, remote workplaces, and mobile centers. The transformation of digital service delivery, followed by the creation of the Ministry of Digital Transformation, continues to produce positive effects. The Diia portal and mobile application provide mature digital services based on a remote qualified electronic signature and the full validity of digital documents and credentials. The Diia portal enables access to the most popular electronic public services, and these services are also available in the Diia mobile application and on other web resources of public authorities (Commission Staff Working Document, Ukraine 2023 Report).

Incidentally, the success in digitization emphasizes the effectiveness of cyber security measures defined by the Cyber Security Strategy of Ukraine (Decree of the President of Ukraine № 447/2021). In particular, this is manifested in maintaining the functionality of registration systems and ensuring their reliability in peacetime and during martial law.

Therefore, in the conditions of geopolitical and internal changes, the combination of existing information management systems and innovative solutions is optimal for the functioning and development of registration systems. Strategic perspectives emphasize the importance of changes and their gradual implementation.

At the same time, the effectiveness of cyber security measures is critical to ensure the functionality and reliability of registration systems during digital transformation. Observations on the capacity of digital technologies and pilot projects provide objective information for informed decisions about the development of registration systems. Moreover, digital transformation requires deep understanding and effective implementation to ensure reliability and effective management.

Taking into account the potential of digital technologies, it is necessary to consider the possibilities of developing new legal approaches and reforming existing ones to adapt to modern challenges and standards. In general, the development of technologies and digital transformation require not only technical solutions, but also new legal strategies to ensure the effective and safe functioning of registration systems in the modern world.

Considering that digital technologies shape the choice for modernization of domestic legal systems, observing the capabilities of digital technologies and the effectiveness of their implementation allows us to draw reasonable conclusions about the further development and modernization of registration systems, taking into account possible risks and benefits.

The article's objective is to study the impact of technological development on the legal systems, particularly on regulation of registration systems. There are new challenges and opportunities arising from the transition from traditional to digital approaches. The analysis considers the capabilities of digital technologies, providing information for informed decisions on further development and modernization of the system and determining the feasibility of supporting existing practices as a long-term method of managing registration systems.

**2. Literature Review.** The evolution of technologies is changing the traditional world, giving rise to new legal challenges and becoming the subject of extensive discussion among scholars and practitioners.

Highlighting current challenges, Logvinov V.G. and Medved A.V. emphasize, “Digital transformation changes the way of management... creates an entirely new administrative process... there is a need for the public authorities to review everything they do, rethink and revise both internal and external processes, starting from the interaction between departments... to external interactions with users and organizations... digital transformation, on the one hand, prompts the reengineering of existing processes, and on the other hand, indicates that its greatest efficiency can be achieved only through the reengineering of processes, not just their simple digitization, which can only cause harm” (Logvinov, Medved, 2020).

Continuing the authors' thought, it is noteworthy that digital products are transforming actually every sphere of human activity and are being integrated into more aspects of life, business, and soci-

ety. Investments in advanced technologies are a trend in modern social relations, considering their potential and opportunities. Under these conditions, digitization is not only an enhancement of capabilities but also an increased risk of cyber security. Moreover, the global chain initiated by digitization processes provides the necessity of understanding that any digital products and their implementation in the future may be associated with or cause gaps in the legal system. In confirmation, we refer to the considerations of Konashevych Oleksii (2020), who mentions, “Blockchain fits both legal traditions of property registries, i.e. keeping title records (Torrens system and civil law) and keeping chains of deeds (common law system)... Blockchain is a registry itself... It indicates both: records of property rights (titles) and records of transactions (deeds)... It is clear that it is not possible to transfer the whole system to the blockchain in one night for various reasons (technological, political, organizational, legal). Instead, the traditional public registry and blockchain systems can work in parallel, and therefore, citizens will have the right to choose where they want to manage their property rights” (Konashevych, 2020)

Therefore, it is crucial today to observe the capabilities of digital technologies, and launching of pilot projects is considered positive under such conditions. This provides objective information for making thoughtful decisions regarding further development and modernization of the system, and it is advisable to support the preservation of existing practices as a long-term method of managing registration systems. M. Prado, M. Trebilcock emphasize, “in other words, experimentation creates demonstration effects. Those who are afraid of change can observe concrete results before deciding whether or not to support full-scale reforms. This is often touted as one of the advantages of pilot projects” (M. Prado, M. Trebilcock, 2018).

Expressing interest in recent technological advancements, M. Tridimas, T. Bloomsbury draw attention to the fact that the European Union has initiated “in the process of developing an EU-wide blockchain infrastructure. Blockchain law, like the law of the interaction between *lex cryptographia* and the mainstream legal system” (M. Tridimas, T. Bloomsbury, 2021), as “Blockchain gives greater control over personal data than the techniques of centralized data storage” (M. Tridimas, T. Bloomsbury, 2021). The authors (M. Tridimas, T. Bloomsbury) believe that the emergence of the collaborative economy, coupled with artificial intelligence, big data, and 3D printing, sets the stage for something akin to the fourth industrial revolution. Simultaneously, they point out significant challenges faced by domestic jurisdictions in addressing issues related to cryptocurrencies and identify problems arising for blockchain technology due to data protection laws, notably the GDPR in the EU. The GDPR was designed for the centralized collection, storage, and processing of personal data, making it challenging to transpose its logic to decentralized digital ledgers.

The above overview points to global trends in digital transformation and challenges related to legal aspects and opens the floor to a wide range of discussions.

The development of technology in today's world causes new legal challenges and emphasizes the importance of reviewing existing processes. The interaction between traditional and digital approaches requires a deep understanding of existing systems management methods, which is an integral guarantee of validity and efficiency in the future. The further development of registration systems is integral to this context.

In the period of the current technological revolution, the evolution of registration systems is taking place against the background of the transition from traditional approaches to digital innovations. The movement from the past to the future defines new opportunities and challenges that require a deep understanding and development of ways of adaptation for effective management in the conditions of a rapidly changing world.

**3. Initial steps in the establishment of registration systems.** The introduction of electronic registers in Ukraine was carried out based on the distribution of powers between authorities according to their competence.

The first electronic registers, implemented in the 2000s, facilitated the management of interconnected data with the ability to search, store, and update information in the relevant regulatory area. The peculiarity was in reproducing information on electronic media and paper, with a priority given to preserving information on paper documents. Registers were distinguished by property rights to real estate (buildings, structures, etc.) and land plots, and registration actions were carried out within the administrative-territorial unit, with no electronic exchange of information between registers. The introduction of electronic registers was preceded by registers formed on paper. For example, in the 1960s–1990s, the procedure for registering rights to real estate (other than land plots) in Ukraine was defined by the Instruction on the Procedure for Registering Houses and Homeownership in cities and villages of the Ukrainian SSR, the Instructions approved by the Ministry of Communal Economy of the Ukrainian SSR on January 31, 1966, and coordinated with the Supreme Court of the Ukrainian SSR on January 15, 1966 (Order of the Ministry of Communal Services of the Ukrainian SSR, 1966) were in action. According to the requirements of the Instructions, Registration Books of the households of local Councils of deputies of workers, state, cooperative, and public institutions, enterprises, and organizations, the Journal of house (household) owners alphabetically by surnames or names of institutions, enterprises, and organizations, and the Journal of houses (households) belonging to enterprises and organizations alphabetically by street names, were maintained on paper. The list of legal documents serving as the basis for the registration of buildings and households included 18 titles, including the Register of municipalized buildings, compiled in the process of distributing nationalized and municipalized buildings, and so on. The 1966 Instructions were replaced by the Instructions on the procedure for state registration of ownership rights in 1998 (Order of the State Committee for Construction, Architecture and Housing Policy of Ukraine № 121/10).

Thus, the maintenance of separate Books of registration of objects of residential and non-residential property owned by legal entities and individuals on paper media was started, and a list of legal documents that are the basis for registration of ownership, such as sales contracts, decisions of the arbitration court on distribution of property of the former collective farm, certificates of ownership, and so on.

The beginning of 2002 marked the initiation of electronic registries – databases with a corresponding set of data, organized according to their characteristics, and with relevant interconnections between elements in a defined subject area. At the same time, the priority of saving information on paper media is maintained.

For example, by the order of the Ministry of Justice of Ukraine dated 07.02.2002 № 7/5, the Temporary Regulations on the procedure for registering ownership rights to real estate were approved. According to this regulation, the Registry of Rights was initiated, which included an electronic database, registration cases, journals of registration of rights, and registration of requests for information from the Registry of Rights.

The Registry holder is determined to be the Ministry of Justice of Ukraine, and the administrator is the State Enterprise “The Information Centre”. State registration was permitted exclusively within the limits of one administrative-territorial unit by one registrar of the Bureau of Technical Inventory. The objects of registration were documents certifying ownership and usage (servitude) rights to real estate located on land plots; rights to use (lease, rent) a building, etc. Importantly, the Temporary Regulations on the procedure for registering ownership rights to real estate did not regulate the registration of rights to land plots. Another registry, the State Land Registry, dealt with this issue.

The temporary procedure for maintaining the state land registry, introduced in 2003 (The order of the State Committee on Land Resources № 174/12) (expired in 2012), initiated the creation of a unified system of state registration of land plots, real estate, and rights to them as part of the state land cadastre. The term “State Land Registry” entered into legal use as a component of the state land cadastre, including books of records of state acts on ownership rights to land and the right to per-



manent land use, lease agreements with indication of cadastral numbers of land plots, and the Land Register Book, containing information about land plots, was arranged by using the automated system of the State Land Cadastre. The registration of a land plot and state registration of documents certifying the right to it were carried out within the administrative-territorial unit and performed by the structural units of the State Land Cadastre Center at the State GeoCadastre of Ukraine.

The absence of electronic information exchange between registries made the mutual coordination and data exchange more difficult, hindering the effective functioning of the registration system overall. The next stage was the introduction of unified state registries aimed at creating a unified integrated data management system, which became a national database and is successfully used today. This initiative contributed to simplifying data exchange and enhancing the efficiency of the registration system overall.

In summary, the initial stages of the establishment of registration systems in Ukraine predicted the introduction of electronic registries in the 2000s, based on the distribution of responsibilities among authorities and ensuring data management according to their competence. Preference was given to preserving information on paper. Over time, there arose a need to refine and agree on registration procedures, leading to the introduction of unified state registries that facilitated information exchange and enhanced the efficiency of the registration system. This development signifies a gradual transition from traditional paper-based systems to modern electronic registries, optimizing management and improving the quality of registration services.

**4. The Creation of a Unified Registration System and Their Interaction.** It is noteworthy that the corresponding steps in implementing standards in registry management are primarily associated with the adopted Program of Ukraine's Integration into the European Union, approved by the Decree of the President of Ukraine on September 14, 2000 (Decree of the President of Ukraine № 1072).

The program included several integration directions, among which was the establishment of the Unified State Register of Legal Entities and Individual Entrepreneurs (USRLEIE). Regarding the USRLEIE, it was stipulated that the identification of founders (owners) would be mandatory at the registration stage, and the introduction of new terms such as subsidiary and branch into the legislative field was necessary in accordance with EU directives. The use of advanced technologies and databases and the creation of a unified information database were anticipated to maximize institutional capacity.

As a result, with the approval of the Law of Ukraine “On State Registration of Legal Entities, Individual Entrepreneurs, and Public Associations” in 2003 (Law № 755-IV/14), the first Unified Register was introduced in Ukraine. Its legal focus involved regulating relations arising in the field of state registration of legal entities, their symbols (in cases provided by law), non-legal entities, and individual entrepreneurs. The Unified State Register of Legal Entities, Individual Entrepreneurs, and Public Associations is a technological implementation of the provisions of Article 91 of the Civil Code of Ukraine (Civil Code of Ukraine № 435-IV), according to which the legal capacity of a legal entity arises from the moment of its creation and ceases from the date of entry of the termination record into the Unified State Register, and Part 1 of Article 89 of the Code (Civil Code of Ukraine № 435-IV), according to which a legal entity is subject to mandatory state registration in the manner established by law.

Starting from January 1, 2013, after the approval of the laws of Ukraine “On State Registration of Property Rights to Real Estate and Their Encumbrances” (Law № 1952-IV/16) and “On the State Land Cadastre” (Law № 3613-VI/17), a Unified System of State Registration of Property Rights to Real Estate, including land plots, and a Unified State Geo-Information System of Land Information – the State Land Cadastre were created.

In 2021, with the Law of Ukraine “On Public Electronic Registries” (Law № 1907-IX/18), existing numerous registries were organized, categorizing them into basic registries, other registries, and registries of self-regulatory organizations, as defined by law.



Among the basic registers are the Unified State Demographic Register; Unified State Register of Legal Entities, Individual Entrepreneurs, and Public Associations; State Land Cadastre; Unified State Register of Vehicles; Register of Buildings and Structures; Unified State Address Register; State Register of Property Rights to Real Estate. The objects of these registers include information about individuals, legal entities, and associations of physical and/or legal entities; lands and land plots with real estate objects located on them; specific legal statuses of individuals and their associations, legal entities, public associations, events, certificates, licenses, declarations, notifications, permits, other documents of a permitting nature; natural resources; legal regimes of land use and development of territories and specific objects; movable property subject to state accounting under the law, property and non-property rights, their restrictions and encumbrances, regulatory legal acts, normative acts, and technical documents, court decisions, enforcement documents, other documents and their details, powers of attorney; construction objects and completed construction objects.

Therefore, the implementation of public electronic registers is diversified, including information about individuals and legal entities, movable property, property rights, and other aspects. This reflects the rapid development of state registration tools aimed at facilitating interaction between citizens and authorities, as well as ensuring transparency and accessibility of information.

Let's delve more into a few registration systems to understand their purpose and functioning.

#### **4.1. Unified State Register of Legal Entities, Individual Entrepreneurs, and Public Associations.**

The register is filled with the information about these entities, including their owners, structure, status (termination, reorganization, or liquidation), as well as statutory data, information about the ultimate beneficial owner, and more. The information included in the register takes into account the peculiarities of legal entities based on specific legislative acts. For example, additional provisions of the Law of Ukraine “On Limited and Additional Liability Companies” (Law № 2275-VIII) are applied to enter information regarding a limited liability company, and the requirements of the Law of Ukraine “On Joint Stock Companies” (Law № 2465-IX) are applied for a joint-stock company.

This demonstrates the presence of a systematic approach in creating a state registration system and the existing correlation in the system's functioning through the development of relevant software based on various legal acts, with the expansion of the system's capabilities being evident.

The custodian of the Unified State Register of Legal Entities, Individual Entrepreneurs, and Public Associations is the Ministry of Justice of Ukraine.

The recent legislative changes to the Law of Ukraine “On State Registration of Legal Entities, Individual Entrepreneurs, and Public Associations” (scheduled to come into effect in 2024) (Law № 755-IV) address the issue of state registration of branches and representative offices of a legal entity established under the legislation of a foreign state. In reviewing these changes, the legislator focused on the complexity of the document verification procedure for the state registration of branches and representative offices of foreign legal entities in Ukraine, explaining this by the absence of electronic data exchange with the relevant electronic registers of EU member states.

This underscores that interaction and information exchange using modern forms represent a contemporary approach to effective communication and collaboration. The use of advanced technological developments creates conditions for rapid and secure data exchange between different platforms and participants, making them crucial tools for management and intergovernmental activities.

Let's note that the relevant steps in implementing the mentioned direction have been taken. Indeed, according to the data from the EU Report (2023) “the Ukrainian parliament adopted the Law amending certain legislative acts on ensuring the conclusion of an agreement between Ukraine and the European Union on mutual recognition of qualified electronic trust services and implementation of the European Union legislation in the field of electronic identification. It provides for the obligatory conformity assessment of qualified trust service providers by the independent bodies according to a

certification model, similar to that of the EU” (Commission Staff Working Document, Ukraine 2023 Report).

**4.2. State Register of Real Rights to Immovable Property.** This is the only state information system that processes, stores, and provides information about registered real rights to immovable property and their encumbrances. It contains information about real rights to immovable property, including unfinished construction and ownerless real estate, encumbrances on such rights, and ensures accurate data for all parties involved in these legal relationships. The registry information is officially recognized by the state as evidence of the acquisition, modification, or termination of real rights to immovable property and encumbrances on such rights. Rights arising from legal transactions regarding real estate or unfinished construction, such as buying and selling, gifting, leasing, permanent use, servitude, and others, are subject to mandatory registration in the State Register of Real Rights to Immovable Property to ensure their official registration and legal clarity.

Since 2016, after the adoption of legislative changes by the Verkhovna Rada of Ukraine in the decentralization and transfer of a significant portion of duties from executive authorities to local self-government, the subjective composition of entities providing services in the Registration systems has changed. As a result, executive bodies of village, settlement, and city councils are included in the system of authorities performing duties in the field of state registration of rights, in addition to the Ministry of Justice of Ukraine and its territorial bodies. At the same time, the Ministry of Justice remains the custodian of the State Register of Rights, ensuring its creation and functioning, while the technical administrator is a state enterprise designated by the Ministry of Justice of Ukraine and included in its management scope.

**4.3. State Land Cadastre.** This is the only state geoinformation system of data about lands located within the state borders of Ukraine, their intended use, restrictions on their use, as well as data on the quantitative and qualitative characteristics of lands, their estimation, the distribution of lands among owners and users, and information on land improvement networks and components of land improvement networks. The State Land Cadastre includes geospatial data, metadata, and services, disclosure, and other activities, access to which is provided on the Internet in accordance with the Law of Ukraine “On the National Infrastructure of Geospatial Data” (Law № 554-IX). The registration system is held by the State GeoCadastre, and the administrator is a state enterprise or a state institution belonging to the scope of this authority.

The system data operate on a centralized principle and provide network access to information through means of identification, with the use of XML files remaining a priority in filling the Registration systems. For example, according to the Cabinet of Ministers of Ukraine Resolution of October 17, 2012 (Resolution of the Cabinet of Ministers of Ukraine № 1051), when filling in the State Land Cadastre system, an electronic document is created in the form of an XML file in Unicode (UTF-8) encoding and contains text elements and attributes that include identification and version of the electronic document format and software.

It should be noted that in terms of information preservation priority, record-keeping is carried out on both paper and electronic media, where, in case of inconsistency, information on paper media takes precedence.

**4.4. Interaction of Registration Systems.** The regulatory framework managing the operation of basic Registries in Ukraine provides for the possibility of interaction between information systems, such as the State Land Cadastre and the State Register of Property Rights to Real Estate, the State Land Cadastre and the Urban Planning Cadastre, and cadastres of other natural resources. The practical implementation of such exchange involves the software and technical support of the legal norm by ensuring the functioning of the relevant Registries in correlation with the applied software, allowing for real-time information interaction between the Registries.

It is important to note that currently, the Registries in Ukraine operate with certain limitations due to the imposition of martial law under the Law of Ukraine “On the Legal Regime of Martial Law in

Ukraine” (Law № 389-VIII) in connection with the military aggression of Russia. Existing threats and risks serve as an incentive to establish an appropriate level of legal and technological security of information systems, find optimal ways of their operation, and ensure reliability in application.

Regarding the structure and format of information files transmitted and received in the process of information interaction, as defined by the Procedure for maintaining the State Register of Rights № 1141 (Resolution of the Cabinet of Ministers of Ukraine № 1141), procedures for the interaction of information systems and their changes are determined by the Ministry of Justice together with the state body that is the holder (manager, owner, administrator) of the particular information system. This is done through decisions that are documented by separate protocols /agreements in the established way.

A number of acts regulating the interaction of Registration Systems do not contain additional information on the technical regulation of interaction but only define the basic principles of interaction and information exchange between Registries. Among the adopted acts, the Procedure for the interaction of information systems of the State Register of Property Rights to Real Estate and the State Land Cadastre, approved by the order of the Ministry of Justice of Ukraine, the Ministry of Economic Development, Trade and Agriculture of Ukraine on November 23, 2020, № 4060/5/2416, the Procedure for information interaction between the State Register of Property Rights to Real Estate, the Unified State Register of Legal Entities, Individual Entrepreneurs, and Public Formations, and the Unified State Register of Judicial Decisions, approved by the order of the Ministry of Justice of Ukraine, the State Judicial Administration of Ukraine on January 29, 2019, № 270/5/94, the Procedure for information interaction between the State Land Cadastre, other cadastres, and information systems, approved by the resolution of the Cabinet of Ministers of Ukraine on June 3, 2013, № 483, the Procedure for the transfer, storage, operation, and access to state information resources (public electronic registers) and their backup copies hosted on cloud resources and/or data processing centers located outside Ukraine, approved by the resolution of the Cabinet of Ministers of Ukraine on December 30, 2022, № 1500.

Access to the use of unified registries is facilitated through electronic identification using an integrated electronic identification system. The access marker is an object with unique attributes, and authorization is applied through login to prevent unauthorized access to the registry.

The architecture of modern registration systems is centralized, where government authorities act as holders and guarantors of the reliability of the system's operation. Registration systems are specialized ones which use multi-purpose processes, allowing network connection, and providing access to numerous users.

For example, the electronic interaction system of state electronic information resources called “Trembita” is an information and communication system designed to automate and technologically support data exchange between subjects of electronic interaction from electronic information resources based on unified rules and protocols while providing public (electronic public) services and the fulfillment of other tasks assigned to them. The software package includes tools for accumulating, accounting, and displaying information about participants of the system, subjects of electronic interaction, operators, electronic information resources, program interfaces, services, and electronic information interactions. The system is managed by the Ministry of Digital Transformation.

It is worth noting that “Cybernetica has been the lead IT partner for the development of Trembita. According to Riho Kurg, head of data exchange technologies at Cybernetica, while X-Road and Trembita are 'practically the same' from a usage point of view, they have different internal mechanisms, in part because the Ukrainian government insisted on using Ukrainian cryptography, which gives Trembita another cryptographic layer over international standard algorithms. Trembita also has increased security around signature verification and more protection at the operating system level” (e-Estonia, Post date: April 22, 2021).

The system is one of the key elements of the infrastructure for the providing of electronic services to citizens and businesses, which provides convenient, unified access to the data of state registers.

The legal and regulatory framework for the functioning of the basic registries in Ukraine regulates the possibility of interaction between registration systems. At the same time, interaction requires software and technical support, as well as attention to restrictions related to martial law. At the same time, it is important to take into account the architecture of centralized registration systems that ensure the efficiency and security of functioning, as well as the use of integrated electronic identification systems to ensure safe access to registers. Such systems as "Trembita" are key elements of the infrastructure for the providing of electronic services, encouraging convenient access to the data of state registers for citizens and businesses.

**5. A single window in the use of registration systems: The Centre for the providing of administrative services and application "Diya".** The influence of technological products has contributed to the redesign of the public sector, becoming a crucial factor in the development of Registration systems. In 2012, the Law of Ukraine "On Administrative Services" (Law № 5203-VI) was approved, initiating the standardization of access forms to a diverse range of information, the custodian of which is the executive authorities. The legal framework introduced the terms "administrative" and "technology card", which defined the type of administrative service and the corresponding procedure and deadlines for its implementation. Among the list of services, administrative services include the registration of property rights to real estate, the right of trust ownership as a means of ensuring obligations on real estate, an object of unfinished construction, the registration of property rights derived from ownership, administrative services for providing information from the State Register of Property Rights to Real Estate, state registration of a land plot, and ordering an extract from the State Land Cadastre regarding a land plot and so on.

It is worth noting that the list of services is diverse and outlines a significant area of legal relations related to objects of civil rights defined in Article 177 of the Civil Code of Ukraine (movable and immovable property (land, buildings, etc.), securities, digital assets, property rights, works and services, results of intellectual, creative activity, information. The formation of a new service is primarily associated with the approval of legislatively defined legal norms and their practical application.

**5.1. The Centre of Administrative Services.** The implementation of the provisions of the Law of Ukraine "On Administrative Services" (Law № 5203-VI) defined the necessity to establish The Centres of Administrative Services (CAS) – a permanently operating working body or executive body (structural unit) of local self-government and state administrations. The activities of the CAS are based on providing service according to the principle of a single window, with the authority to manage registration systems not falling within the competence of the specified body. Interaction between service providers (system holders) and the CAS is carried out through the composing of cooperation agreements between the CAS and the service provider, who ensures the management and filling of the registration system.

The network branching of CAS has provided the opportunity for service provision in various parts of Ukraine. According to information published on the website of the Cabinet of Ministers of Ukraine, the Ministry of Digital Transformation of Ukraine noted that "as a result of monitoring in the II quarter of 2021, the CAS network grew to 2337 points of access to administrative services. Compared to the I quarter of 2020, the CAS network grew by 1286 points of access, which is twice as much as the indicator of the previous year. Only in the first half of 2021, the number of access points increased by 516, which is 28% more than in 2020" (How the Ministry of Digital Transformation of Ukraine expanded the geography of providing administrative services: statistics. Published on August 11, 2021).

Furthermore, in 2021, the Law of Ukraine "On the Features of Providing Public (Electronic Public) Services" (Law № 1689-IX) was approved, expanding the circle of subjects – service providers, pre-



dicting to give the services using information and telecommunication systems, including the Unified State Web Portal of Electronic Services, with the application of identification of the person – requester by applying an electronic signature created in accordance with the Law of Ukraine “On Electronic Trust Services” (Law № 2155-VIII).

**5.2. Diia Portal.** The functioning of the Diia portal is regulated by the resolution of the Cabinet of Ministers of Ukraine № 1137. The “Diia” portal is the only state web portal for electronic services. This system integrates various information and communication as well as just information systems to operate as a unified system and communicate with other information systems. It includes the mobile application “Diia”, the Administrative Services Registry, the user's electronic cabinet, mobile applications, and other components, with the regulation of these requirements being clearly defined.

The electronic information interaction of the “Diia” Portal with state electronic resources and other systems is carried out through electronic interaction systems, applying requirements for personal identification in digital space and ensuring information security measures.

In summary, the application of digital technologies in administrative processes allows registration systems to become more transparent, efficient, and accessible to citizens. However, it is crucial to continue developing and improving these systems, particularly in the direction of enhancing cyber security and resistance to potential threats. The overall trend of improving administrative services and registration systems reflects a commitment to a high standard of quality in the interaction between citizens and government authorities. The transition to digital platforms and the use of modern technologies contribute to the creation of an efficient and transparent system that meets the requirements of a modern information society. The interaction of the web portal with state electronic resources and other systems is regulated by the application of relevant standards and ensures information protection. These steps not only enhance the accessibility of administrative services but also contribute to the modernization of registration and information exchange systems.

**6. Pilot Projects as Tools for Testing New Solutions.** Pilot projects can serve as a tool for testing new solutions, evaluating their suitability, and determining optimal paths for further development.

It is noteworthy that the practice of implementing pilot projects is well-known in Ukraine.

The pilot projects being implemented are a space for conducting experiments in a certain area of legal relations with the initial data known at the initial stage of the pilot project. This is a kind of testing of legal capacity, in particular, of the registration system using new software products and the search for a modified approach to the enforcement of existing legal relations.

At the same time, there is no definition of a pilot project in Ukrainian legislation. According to general practice, pilot projects are implemented temporarily for the development of current legal acts, and according to the direction of application, they are a separate form of legal regulation of management procedures.

For example, pilot projects are associated with the deregulation of land relations in Ukraine. Before this period (until 2016), each region of Ukraine (a region is part of the administrative-territorial structure of Ukraine and includes cities, districts in cities, districts, towns, villages) practically independently made solutions of issues related to the application of law in regulating land relations and resolving land disputes. The main reason for such autonomy was the storage of archival land management documentation only on paper according to the location of the land. The change in the approach to storing archival documentation and its transformation into electronic form enabled the implementation of several pilot projects. Cabinet of Ministers of Ukraine Resolutions № 580 of August 31, 2016 (no longer in force) and № 455 of June 3, 2020 (no longer in force) approved the implementation of projects introducing the principle of extraterritoriality in coordination of land management documentation with the territorial bodies of the State Service of Geodesy, Cartography, and Cadastre, as well as in the state registration of land plots. However, these experiments did not continue in implementation, in particular due to changes in land legislation regarding the cancellation of the procedure for approval of land acquisition projects.



In 2015, by the order of the Ministry of Justice of Ukraine № 1159/5 of July 7, 2015, a pilot project was introduced in the field of state registration of property rights to real estate and their encumbrances regarding the pre-submission of applications. It was envisaged to expand access to software compatible with the software of the State Register of Property Rights to Real Estate (no longer in force in 2015).

By the resolution of the Cabinet of Ministers of Ukraine dated October 26, 2016, № 789-r, the implementation of a pilot project on informing in the field of state registration of property rights to real estate and their encumbrances was introduced. This pilot project was implemented to protect property rights and economic interests of citizens, reduce the risks of illegal seizure of real estate, provide information about registration actions in the State Register of Property Rights to Real Estate, improve the functional capabilities of the property registration and monitoring system.

By the resolution of the Cabinet of Ministers of Ukraine dated May 22, 2019, № 374-r, a pilot project was introduced to implement electronic accounting of cultural heritage objects. This project aims to implement unified standards in the field of cultural heritage protection to provide access to information about cultural heritage objects and their effective accounting.

Pilot Project on Electronic Registration of Cultural Heritage Objects is a Step towards Implementing European Standards in the Protection and Accounting of Cultural Values, creating conditions for access to information about cultural heritage objects and their systematic maintenance, which is an important stage in the management and preservation of Ukraine's cultural heritage.

In 2021, a pilot project was introduced, approved by Resolution № 1438 dated December 29, 2021, which envisages the inclusion of information about land plots certified by land surveyors in the State Land Cadastre. This approach is considered an alternative for the development of the land legal relations system and deregulation. It is essential to note that the experiment can be successful with developed technical regulations for access to the system and its use, including the correct display of information, defined liability forms, ensuring the system's reliability, and protection against unauthorized access to the State Land Cadastre. At the same time, the specified pilot project has already been introduced with certain time limitations, namely its validity is restricted until the termination or cancellation of martial law in Ukraine and within one month from the day of its termination or cancellation.

By the resolution of the Cabinet of Ministers of Ukraine dated October 13, 2023, № 1078, the introduction of a pilot project on mass land valuation was approved. According to the established procedure for implementing the pilot project, mass land valuation is a form of land plot assessment carried out throughout the territory of Ukraine, and the assessment results will serve as data filling for the State Land Cadastre. The project's implementation is based on the use of information obtained through electronic information interaction between the State Register of Property Rights to Real Estate and the State Land Cadastre and will serve as a basis for land tax purposes. The geoinformation system of mass land valuation, which is part of the State Land Cadastre, is a step towards the possibility of introducing digital technologies into land resource assessment. This system will ensure automated processing and updating of data, thereby contributing to a more accurate and up-to-date estimation of land cost.

In summary, the process to continue creating the legal basis for the effective use of digital technologies in registration systems, and the adoption of new laws such as “On Electronic Communications” (Law № 1089-IX) and “On Virtual Assets” (Law № 2074-IX), indicate the rapid development in this direction. All of this indicate a gradual transition to modern technologies in the field of registration services and readiness for further evolution of registration systems in Ukraine.

**7. Conclusions.** Modern registration systems in Ukraine have a high level of development and functionality, based on specialized registration systems with a centralized structure. State authorities act as their holders and play a key role in ensuring reliability. These systems are an important tool for

effective registration, control and accounting of various legal relationships and information related to various aspects of public life.

The interaction of registration systems and forming innovative solutions in the field of access to the providing of services are effective. The implementation of digital technologies is carried out in stages, with the parallel possibility of network use and the providing of legal clarity to bridge the gaps between social relations and digital products. The effective implementation of the latest forms of interaction, such as web portals and identification tools, is a key element in this context.

Therefore, the development of technologies and digital transformation require not only technical solutions, but also new legal strategies to ensure the effective and safe functioning of registration systems in the modern world.

At the same time, maintaining the reliability of the system is determined by a critically important aspect, especially in the conditions of martial law.

The adaptability of the organizational abilities of the system to integration and the latest technological changes is the central element. Ensuring harmonious implementation contributes to the achievement of strategic goals in the development of the democratic model of law and modern challenges.

This approach will contribute to a qualitative transition to modern technologies in the field of registration services and indicates readiness for the further evolution of registration systems in Ukraine.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-8>

## LEGAL BASIS OF THE PRINCIPLE OF SUBSIDIARITY IN A DEMOCRATIC SOCIETY

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**Abstract.** The article is dedicated to theoretical basis of the definition of the concept of "subsidiarity" in the context of its application as a key principle of a democratic society in the relations between central and local authorities; examines the definition of the conceptual and categorical group of scientific research of the principle of subsidiarity; researches the legal framework, place and role of this principle in a democratic society, in particular, in the EU countries. The author pays attention to the fundamental approaches to the application of the principle of subsidiarity in the implementation of the State regional policy of Ukraine in budgetary relations.

**Key words:** subsidiarity, principle of subsidiarity, legal principles, power, government, authorities and local self-government bodies, democratic society.

**Introduction.** Democracy is an important and universally recognised value in the organisation of the social order. However, democracy is formed and gains its true meaning through its characteristic properties – democratic values and principles, which are the life-giving force of society and filling it with primary legal essence through consideration of interests of different social groups in the social organisation.

Undoubtedly, one of the foundations for ensuring the sustainable development of a democratic society is the enshrining of fundamental principles at the level of the basic law or declaration of guarantees in the organisation of the democratic society with the formation of power institutions, which carry out the most important representative function in the name of society and in the public interests. Therefore, a democratic society in its fundamental law ensures and guarantees the implementation of principles and values as its ideal principles, including: freedom, equality, justice, limitation of power and its institutions, free and responsible individual, rule of law, constitutionalism, freedom of speech, freedom of the press, pluralism of opinions, etc. It is obvious, that realisation of law in the relations between a member of society (individual, citizen or social group) and institutions (public, state) is the most possible and effective in a democratic society, which implemented through the specified values and principles.

One of these principles of organising public life is the principle of subsidiarity, which guarantees the protection of individuals from abuse by higher-level authorities and calls on the authorities to help individuals and social groups fulfil their social responsibilities. This principle applies both between the individual and the community and between the individual or community and state institutions, whereas each individual or social group can offer something authentic to the state institution, declare or initiate with the intention of balancing certain interests. Denying subsidiarity or limiting it in the name of democratisation or equality of all members of society limits or even destroys the spirit of freedom and initiative.

Certain forms of centralization, bureaucratization, social assistance and unjustified and excessive presence of the state and its power apparatus in the life of society are contrary to the principle of subsidiarity. The origins of subsidiarity as a principle are rooted in the fundamental positions of the philosophy of law and the development of public governance in general. In this way, the principle of

subsidiarity in the context of modern governance development is currently applied with the role of complementarity and harmonization of the resource and public parts in a democratic society, which is established at the level of constitutions or fundamental laws of countries. Therefore, in the context of the scientific objective for this research, there is a necessity to reveal the nature of the subsidiarity principle, its theoretical and practical significance, and the importance of its implementation in the field of law, in particular, on the examples of European countries.

Given the current research on the principle of subsidiarity, it should be noted that the attention is currently focused on studying its content from the side of traditional application – basically in the context of political and philosophical analysis and public administration, whereas in this research we examine the constitutional and legal basis of the principle of subsidiarity in a democratic society in general, i.e. in a somewhat expanded sense.

Among the most famous scholars of constitutional, administrative law and public administration who have researched the principle of subsidiarity in various aspects, it is worth noting the following: V.B. Averyanov, S.S. Alekseev, P.M. Rabinovich, Y.P. Bytyak, O.V. Batanov, M.I. Kozyubra, as well as works by O.F. Skakun, V.V. Ladychenko, I.A. Kuyan, N.V. Mishina, O.O. Maidanyk, B.V. Kalynovskyi, T.V. Panchenko, P.M. Liubchenko, M.Y. Saviovskyi, I.V. Drobush.

**Purpose of the Study.** The purpose of this article is to research the legal fundamentals of the principle of subsidiarity in a democratic society in terms of the origins and genesis of the definition, and to expand the scientific general theoretical value and scope of application of this principle.

**Main Part.** The legal nature, sources and origins of the principle of subsidiarity are an important precondition for determining the legal basis of the principle of subsidiarity, as well as its connection with human and society, and its formation as a scientific and democratic social value in ensuring effective of constitutional regulation (Batanov, 2020: 87). Subsidiarity (from the Latin *subsidium* – additional) is an organizational and legal principle according to which tasks should be solved at the lowest, smallest or most remote level where their solution is possible and effective.

The principle of subsidiarity has its roots in the ideas of Plato and Aristotle, as well as in Medieval Urban Law. In the Catholic social teaching, this concept became a part of the official doctrine after the publication of the Encyclical *Rerum Novarum* (1891) by Pope Leo XIII. Later, Pope Pius XI promoted the advantages of subsidiarity as a third possible way, intermediate between state dictatorship and state non-interference in the economic sphere of society. In accordance with the principle of subsidiarity, the transformation of a centralized state administration into an authoritarian one was opposed by the thesis that the legal and administrative functions of the state should be delimited.

The essence of this new principle was clear: it required the centralized state to protect local and regional democracy. The original purpose of the principle was to resolve the conflict between the individual and society, which would avoid the extremes of both individualism and collectivism (Nojkhauz, 2005).

In addition, according to the main provisions of the Code of Canons of the Eastern Churches (*Codex Iuris Canonici Orientalis*), the principle of subsidiarity "states that the authority of individuals and inferior institutions should not be subordinated by the supremacy" (Nedungatt G. (ed.), 2008).

The word "subsidiarity" is of Latin origin and in Ukrainian translation means "additional", "secondary," or "residual". Subsidiarity of power, therefore, means that higher levels of government should be additional, or secondary, in solving the tasks that appear at the lower levels. In other words, the principle of subsidiarity requires building a system of governance from the bottom up rather than from the top down.

The concept of subsidiarity states that local conditions and circumstances not only differ from one another, but also change with time. Therefore, the scope of services provided, as well as the scope of functions of local governments, should be appropriate to ever-changing and updated needs and conditions, taking into account local requirements and wishes. Consequently, the principle of

subsidiarity is a principle of decentralization, according to which social problems should be solved at the lowest and most distant level from the center. Moreover, the central government should play a subsidiary (auxiliary) rather than a subordinate (subordinate) role. The application of the concept of "subsidiarity" as a characteristic of the organization of relations between different levels of government is associated first of all with the development of European federalism, the origins of which are associated with Protestant reformism based on the teachings of J. Altuzius (Panchenko, 2011: 33) and the theory of the sovereign monolithic state by J. Baudin. Thus, J. Baudin theoretically substantiated absolutism both in France and in Europe at that time.

According to the teaching of J. Altuzius, "...every larger union is composed of corporate unities of closer unions. The State, like the unions that compose it, differs from them only in its exclusive sovereignty; it, as the highest legal force, is endowed with new features and functions, but its right is limited by the rights of the unions that compose it" (Nedungatt G. (ed.), 2008). According to the teaching of J. Altuzius, a human being is completely dependent on others to ensure his life in harmony with the God".

Also, according to J. Altuzius, the sovereign should be the nation, not the monarch. The liberal version of complementarity, as one of the foundations of the concept of subsidiarity, on the one side, contains the idea of a complementary approach in organising the relationship between government and the individual, and on the other side, directly prevents or limits the interference of a higher social authority in the affairs of a lower one.

The paradigms of political and legal thought on subsidiarity were conceptually formed by Aristotle, but in the Medieval epoch, the origin and essence of the state were laid down in the then dogmas of the Roman Catholic Church, by the follower of Aristotle and theologian Thomas Aquinas (Panchenko, 2011).

The Catholic Church, which had a very powerful power at that time, significantly supported the teachings of Thomas Aquinas. Because according to the scientist's interpretation, "all power is from God", the doctrinal essence of power introduced such an order of relations of domination and subordination in society, which determined the limits of state interference in private affairs, requiring certain obligations from higher parts of social organisations in relation to lower ones, thereby already introducing the principle of subsidiarity as an approach to public legal relations.

For a long time, the rigid and hierarchical form of government in France and most of the European continent was aimed at levelling regional and local peculiarities, but ensured the implementation of national decisions of a centralised country. Accordingly, in contrast to such a state, a decentralised and federal state looked weak.

In Europe, this was especially evident in the Medieval period during constant military conflicts, when a federal state, having no federal army but only army units from different federal states, lost to the army of a monolithic and centralised state system. A convincing example of this was Napoleon's administrative organisation, which became a model for other European states, as it most effectively ensured the implementation of the will of the head of state or parliament. Consequently, until the XXth century, in the European society and the world were dominated by confidence in the power of centralised state power.

However, after the Second World War, as a result of socio-political transformations, preference was given to a decentralised organisation of the state and the principles of subsidiarity and regionalisation. Moreover, even in France, a powerful centralised model of state structure was abandoned. Scholars have also researched the genesis and legal origins of the principle of subsidiarity in the Federal Republic of Germany from the Christian Church, which also dominated the society of the Middle Ages at the level of state institutions, and which in modern circumstances has preserved and consolidated its institutional extension in Germany itself and outside its representative limits in the European Union.

Thus, the socio-political structure of the European continent was built on a new firm worldview that centralism does not enhance the state, and, moreover, it can lead to the incapacity of the government and government institutions. Therefore, enhancing the role of the regions, as opposed to decreasing the overall role of the centre, became the leading principles of European policy. So, the fundamental principles are the most important foundational principles on which law as a mandatory social regulator is based (Petryshyn, Poghrebnyak, Smorodynskiy, 2015: 125).

The visions of modern legal scholars differ in the definition of the concept and application of the "principle of subsidiarity", for example, O.F. Skakun believes (Skakun, 2021) that in accordance with the principle of subsidiarity, the state determines the powers that should be given to local representative bodies and their executive committees to the extent that they can fulfil. Ukrainian scientist O. Batanov considers subsidiarity in social relations as the principle of priority of the rights and interests of an individual over the rights and interests of any community, the priority of a smaller, previously formed community, compared to a higher-level community.

Moreover, according to his opinion, subsidiarity comes from a specific individual, i.e. an individual participating in a system of different communities, outside of which he has the opportunity to be realised as a personal being. The communities (social groups or institutions) of which an individual is a member can be of any nature: family, territorial community, union, association, nation, nationality, civil society, labour collective, enterprise, i.e. everything within which a human being realises himself as a person.

In spite of the fact that there is a whole hierarchy of communities (institutions) in society, each person assesses the significance of each of them according to his/her own scale of values, on the basis of which he/she builds his/her own hierarchy of communities (institutions). Based on this, the scholar believes that in the most general form, the principle of subsidiarity is reduced to the fact that communities are subsidiary (additional) to the individual, or otherwise, it is not the individual who exists for the community, but different communities are formed to realise his or her interests (Batanov, 2004).

Thus, the state should form a theoretical basis and establish a single line and rules for the coexistence of various political forces, corporations, etc. within individual territories (states) and in relations between them (Kujan, 2013: 51).

Therefore, the principle of subsidiarity is a principle of decentralisation from the perspective of the central government. According to some national researchers (Moshak, 2017: 40), in democratic states, the principle of subsidiarity is the basis of the institutional organisation of power and governance, and it means that, firstly, the state fulfils only the functions that cannot be fulfilled by citizens, their associations and territorial communities, and, secondly, that the competence of higher-level self-government bodies includes the fulfilment of only those tasks that cannot be better carried out at a lower level.

Consistently implemented, this principle can work quite effectively. At the same time, attempts to incorporate it into the legislative framework in many cases face great difficulties and do not receive logical development and pose a serious problem of interaction between the existing levels of government in the state. As stated in the European Charter of Local Self-Government (European Charter of Local Self-Government, International document, 994\_036) the goal of the Council of Europe is to achieve greater unity among its members in order to preserve and implement ideals and principles, including the principle of decentralisation of power. The European Charter also defines the obligation to have a constitutional and legal basis for local self-government in the national legislation (of the country that has joined the Charter) and to have such a basis "as far as possible in the constitution" of country.

In addition, Article 9(4), (5) and (7) of the Charter defines in more detail the approaches to the distribution of financial resources of local self-government bodies, in particular, the financial systems



that form the basis of local self-government resources should ensure that the available resources are brought in line with the real growth in the cost of the tasks they perform; protect financially weaker local governments, introduce budget equalisation procedures or similar measures to overcome the consequences of unequal distribution of financial resources. In other words, the approaches of "financial subsidiarity" are laid down at the stage of formulating the principles in the national legislation of a Community Member State.

In general, given the ambiguous consequences of regionalisation in European countries, the draft European Charter of Regional Self-Government developed by the Council of Europe was never adopted. This document established the definition of regional self-government, the powers of regional self-government bodies, and their rights. And this is despite the fact that the draft included the right of any Council of Europe member state to adapt the application, and also defined the principles of administrative supervision of regional self-government bodies by the state. In Europe, the idea of subsidiarity has a long history and is connected with the Catholic tradition that society should intervene in a person's affairs only when the actions of the family and regional religious community prove ineffective. The principle of subsidiarity is one of the cornerstones of European Union law and a basic requirement of the European Charter of Local Self-Government. The principle of subsidiarity is very important for the EU, as it allows for balanced decision-making, with due regard for the interests of EU member states.

Article 5 of the Consolidated Version of the Treaty on European Union as amended by the Lisbon Treaty, that "In accordance with the principle of subsidiarity in areas not within its exclusive competence, the Union will act only when and to the extent that Member States cannot properly achieve the aim of the measure planned ... and that it is better to do so at Union level having regard to the scope or results of the measures proposed" (Treaty establishing the European Economic Community, international document, 994\_017).

In particular, the provisions of this Article are more specifically specified in Article 133(1) and Article 155(1) of the Treaty on European Union regarding the conduct of the European Union's trade activities Common – "trade policy shall be based on the same principles, in particular with regard to changes in tariff rates, the conclusion of tariff and trade agreements, the achievement of uniformity of liberalisation measures, export policies and trade defence measures, such as those to be taken in the event of dumping or subsidies" and that the EU, in order to achieve a common objective "may support projects of common interest supported by Member States and identified within the framework of the recommended projects ...", in particular "by analysing their implementation, providing loan guarantees or subsidies for interest relief. ...the Community may also promote the financing of individual Member States' projects in the sphere of transport infrastructure through a Cohesion Fund...".

The thesis that European integration is impossible without the introduction of subsidiarity has been proved by a large number of studies and can be considered an axiom. According to the Declaration on Regionalism in Europe, which was adopted at the initiative of the Assembly of European Regions (Declaration on Regionalism in Europe, international document, 1996), a region reproduces the specifics of its political identity, which can take a variety of forms that demonstrate the democratic will of each region, while taking into account that the participation of regions in the decision-making process in European institutions in accordance with the principle of subsidiarity makes the activities of the European Union more open for the citizens, subsidiarity becomes the main principle that establishes the role of any region.

According to the Declaration, the division of powers between the state and the regions is established by the national constitution or national legislation in accordance with the principles of political decentralisation and subsidiarity. According to these principles, functions should be performed at the level closest to the citizens. Following Article 9, paragraph 1, of the Declaration, regions and local authorities, carrying out the powers which have been delegated to them, cooperate on the basis of mutual trust and in accordance with the principle of subsidiarity.

National constitutions of EU countries reflect the principle of subsidiarity in their constitutions in different ways. For example, Article 2 of the Constitution of the Republic of Poland (Shapoval, 2018) states that the Republic of Poland is a democratic state based on the rule of law, which implements the principles of social justice. In other words, the principle of subsidiarity is established as a constitutional basis that constitutes social justice in the orderly and coherent organisation of state power and legal life of the society of the Republic of Poland. The only exception is the norms of part three of Article 228 of the Constitution, which defines restrictions on the principles of activity of public authorities of the Republic of Poland during the period of state of emergency. In its turn, the Republic of Bulgaria, in enshrining its national constitutional foundations (Constitution of the Republic of Bulgaria, 1991), is guided by universal human values such as freedom, peace, humanism, equality, justice, tolerance, considering the highest principle to be the rights of the individual, his or her dignity and security; the preamble to the Constitution of the Kingdom of Spain (Constitution of the Kingdom of Spain, 1978). guarantees democratic coexistence within the framework of the Constitution and laws in accordance with a fair economic and social order; the preamble to the Constitution of the French Republic contains references to the principles defined in the Declaration of 1789, confirmed and supplemented by the Constitution of 1946 and the Charter of the Environment of 2004 (Constitution of the French Republic adopted by referendum on 04.10.1958, 2015). In particular, the Declaration of 1789 considered society as a single social organism, whose political institutions are based on simple and unquestionable principles and were aimed at the observance of the Constitution and the happiness of all.

The Constitution of the French Republic of 1946 enshrined economic, political and social principles and the principle of preservation of the environment for future generations in Article 2 of the Charter of the Environment. In the Constitution of the French Republic, it is worth paying attention to the first and second parts of Article 88-6, which establishes the right of the National Assembly or the Senate to issue a reasoned decision on the compliance of any draft European legislative act with the principle of subsidiarity.

Such an opinion can be sent by the President of the relevant chamber of the French National Assembly to the President of the European Parliament, the Council and the European Commission or through the French Government's appeal to the Court of Justice of the European Union for reasons of the inconsistency of the European legislative act with the principle of subsidiarity. The basic provisions in Article 1, paragraph 2 of the Constitution of the Slovak Republic (Constitution of the Slovak Republic, 1992) only refer to the recognition and observation of the general rules of International Law and international obligations, but in Chapter IV "Local Self-Government" of Article 65, paragraph 2, states that a municipality and a higher territorial unit shall finance their needs primarily from their own income and from state subsidies.

In this part of Article 65 of the Constitution, it is also underlined that the issues of distinguishing taxes and fees of community and taxes and fees of a higher territorial unit are established by law, in particular, the issue of subsidies. In the Preamble of the Constitution of the Czech Republic (Constitution of the Czech Republic, 1992), it only states that the Czech society as a democratic state is based on respect for human rights and the principles of civil society and the rule of law. According to Article 22 (1) of the Constitution of the Federal Republic of Germany (Constitution of the Federal Republic of Germany, 1949), in order to implement the idea of a united Europe, the Federal Republic of Germany is participating in the development of the European Union, whose responsibilities include guaranteeing compliance with the principles of a democratic, legal, social and federal state, as well as compliance with the principle of subsidiarity, which guarantees the protection of the basic rights that are in essence identical to the fundamental rights determined in the Basic Law.

The principle of subsidiarity is a fundamental principle of the European Union's legal framework. According to Article 5 of the Treaty establishing the European Community (Treaty establishing the

European Economic Community), the European Community acts under the powers conferred to it by this Treaty and for the purposes set out in this Treaty. At the same time, in areas that do not belong to its exclusive competence,

The Community acts in accordance with the principle of subsidiarity only if and to the extent the purpose of the planned measure by the Member States.

Among the protocols attached to the Treaty on European Union and the Treaty establishing the European Community, the Protocol (No. 30) on the implementation of the principles of subsidiarity and proportionality (1997) was also approved (Batanov, Levenets (ed), Shapoval (ed) and others, 2011). In accordance with paragraph 3 of Protocol No. 30, the principle of subsidiarity is the guiding principle of how such powers should be carried out at Community level.

Subsidiarity is a dynamic concept and should be applied in the view of the goals formulated in the Treaty, and it enables the Community to within its powers, to expand its actions when circumstances so require, or to limit or discontinue them when circumstances so require, or, conversely, to limit or discontinue them if their their implementation is no longer justified. The concept of subsidiarity has been legally enshrined in EU regulations, according to which decision-making in the EU should be as close to the citizens as possible. This implies that the EU, even if it has legislative and other powers, should refrain from interfering in those issues of public life that can be resolved no less effectively by central, regional or municipal authorities of the Member States [22].

Nowadays, local authorities are considered to be the main institutions of democracy, i.e. institutions that are closer to citizens and manage local affairs in accordance with the principle of subsidiarity. In Ukrainian legislation, the principle of subsidiarity has a very practical meaning, which is not directly reflected in the Constitution of Ukraine, however it takes a place in the fundamental approaches to the realisation of regional policy and in the mechanisms of budgetary relations between the State, Communities and Regions. In accordance with Article 8 of the Constitution of Ukraine (Constitution of Ukraine was adopted at the fifth session of the Verkhovna Rada of Ukraine, No. 254к/96-BP), the principle of the supremacy of law is recognised and applied in Ukraine. In accordance with point five of Part One of Article 3 of the Law of Ukraine "On the Principles of State Regional Policy" (Law of Ukraine On the Principles of State Regional Policy, 2015, No 156-VIII), the principle of subsidiarity is defined as the principle of realising power at the lowest level of government, where it is most effective. Under point seven of Part One of Article 7 of the Budget Code of Ukraine (Budget Code of Ukraine, 2010, No 2456-VI), the budget system of Ukraine is based, in particular, on the principle of subsidiarity, which is defined as the distribution of types of expenditures between the state budget and local budgets, as well as between local budgets, and is based on the need to maximise the approximation of public services to their direct consumers. The Budget Code of Ukraine also establishes the criteria for the allocation of the types of expenditures specified in paragraphs 2 and 3 of part one of Article 82 of this Code between local budgets based on the principle of subsidiarity, with due regard to the criteria of completeness of public services and their proximity to the direct consumer.

**Conclusions.** Our research has shown that the reasons for decentralisation were mainly the following: decreasing the dominance of the "centre" with the subsequent establishment of independent local self-government, the transition from a rigid state-planned economy to market relations, and the providing of quality services to the public. The study confirms the fact that decentralisation of state power and administration, the delimitation of powers between central, regional and local authorities, are aimed at partnership through the application of the principle of subsidiarity, which is a recognised principle of governance in a democratic society. The broadening of the scientific general theoretical value and sphere of application of this principle, in our vision, should be reflected at the constitutional level and take a worthy place in the national legislation of each European country in the field of self-government and regional development.

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## THEORY AND INSTITUTIONS OF EDUCATION

DOI <https://doi.org/10.30525/2592-8813-2024-1-9>

### SEARCH OF BASIC VISUAL MATERIALS IN THE PROCESS OF DESIGNING GRAPHIC OBJECTS (ADVENT CALENDAR AS AN EXAMPLE)

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**Abstract.** This article examines the influence of basic visual materials on the creation of graphic objects using the example of an advent calendar. The content of a graphic designer’s activity is considered from the standpoint of finding basic visual materials that trigger the generation of ideas and images. Factors influencing the process of selection of basic visual materials by the graphic designer are clarified. The graphic designer’s environment is considered both external and internal, which has its own specifics. The model embraces two axes that describe the proximity of references and the design environment, the culture of the design studio, as a partial case of the cultural environment. The students’ project activity is considered as the one that implements a certain idea with attributes that determine the graphic designers’ decision and embodies their personal intellectual and creative efforts.

**Key words:** graphic designer, references, basic visual materials, graphic object, advent calendar, project activity, visualization.

**Introduction.** The modern world cannot be imagined outside of information. The expansion of technical possibilities of information exchange has intensified the processes of interaction of graphic designers with the surrounding world, which is characterized by freedom and interaction of cultures in the information space. The intensification of information influences causes the constant formation of new information flows that change the world and the individual in it. And a person, especially a person in a profession that operates with information and its visualization (this directly concerns the specific features of the professional activity of a graphic designer), must have time to pick up these flows, understand them, take into account their direction, so as not to get lost in modernity, not to find in the past, and ideally to manage them.

Among the features inherent in the professional activity of a graphic designer, it should be attributed to its practical orientation, which by assigning an individual from the designer’s personality ensures the design of a certain range of goods, spaces and services (Attfield, 2000). The graphic designer’s project activity does not concern an infinite number of material objects, but in those created in the process of his professional activity, a special personal level of cultural capital is manifested (Rosińska, 2010: 32). In addition, the result of the graphic designer’s work is also the result of designing the interaction of communication and application aspects of the projected objects (subjects, phenomena, events, processes, and in general – individual units (Wszolek & Moszczyński, 2015: 174).

From this point of view, the project activity should be considered as one in which the personal intellectual and creative efforts of the graphic designer with his unique experience stand behind the result, which always manifests itself at a certain position of the “better/worse than the other” continuum, the realization of an idea. The specified integration of intellectual, aesthetic and in a certain way ethical components of project activity is not an arithmetic sum, a mechanical combination, therefore

the design process logically faces the need to resolve various contradictions, including when working on the visual component of the project. This is especially important due to the fact that visualization, visual information is one of the defining components when designing design objects as elements of social life. Therefore, of the three stages of the cycle of reproduction of social order: externalization, objectification, and internalization in graphic objects, internalization as the assimilation of objectified phenomena by a person involved in a certain community becomes the most important (Berger & Luckmann, 1981).

The leading position of visual information in internalization is determined by the fact that visual images convey content, meaning in a form easily understandable to consumers of design, in fact, in visual terms, and also due to the undeniably wide spread in the life of a modern person of various visual technologies that offer the results of their application: paintings, digital graphics, photographs, videos, etc. (Rose, 2016).

In the design industry, most specializations of design activities, in particular, graphic, multimedia design, web design, game design, VR/AR design, interactive design (interaction design), differ in visual technologies, tools and project results. The functional field of a design product is not limited to a utilitarian purpose, each of the design objects has broader functional properties (aesthetic, cognitive, informational, hedonistic).

However, design objects are a means of obtaining information (from the designer through the design object), exchanging information (between the designer and the consumer of the design object), as well as its distribution in society (from the designer, from the consumer of the design object, from the design object itself). In order for the specified chain of transmission and understanding of information to function, it is necessary that the communication between the participants in the process of transmission, reception, and understanding of information takes place on the basis of a language of communication that is understandable to all, especially in the case of visual language.

Visual information is not impersonal, it interprets the world and is a product of the objectification of thoughts, feelings, emotions, and reasoning. A. Traindl emphasizes that visual information is important for the functioning of social reality (Traindl, 2007). It is internalization that is at the heart of the process of a person mastering the objectified elements of social reality in the course of his development, as a result of which he becomes a representative of a certain community, who shares with others the accumulated, mastered cultural experience. A graphic designer is engaged in creative activities and, from a professional point of view, strives to be understood, thus satisfying social needs, creating a part of social reality. Therefore, the purpose of the article is to study the effects of basic visual materials on the creative activity of a graphic designer when he creates design objects that satisfy public needs.

**Main part.** The transmission of information encoded in signs using images, as well as letters, is a manifestation of visual communication, which is especially effective under conditions when words, the basis of modern culture, are not enough, and the image acquires a function similar to the transmitted verbal content. According to A. Frutiger, the expression of communication in a graphic form with the help of drawings, signs and symbols that reflect phenomena that exist in reality indicates a developed abstract thinking, such thinking that leads to the creation of alphabetic writing, which in its final form has a timeless character, detached from symbolic meanings (Frutiger, 2022).

On the other hand, a modern graphic designer perceives the external world partly as a game. He understands that society is external data, that political ideologies are changeable things, that the norms of mass and elitist art change over time, and the line between them is very thin. All these factors together create a significant impact on the creative component of a graphic designer's professional activity, which by its very nature requires a constant search for ideas, images, and content. Therefore, in the process of designing objects of graphic design, the search for basic visual materials based on the understanding of the specifics of the sources of inspiration becomes important, which often becomes the starting point, the driving force of the design process (Borysova, 2023).

The formation of an understanding of visual information, visual images is extremely important both at the stage of design education, which implements the concept of visual literacy (Marshall, 2007), and in the direct professional activity of designing graphic design objects, which provides awareness of the possible influence of selected existing images on the design idea and the expected overall design result.

The usual content of a graphic designer's activity is the search for basic visual materials, which triggers the generation of ideas, images, and ideas for further processing and transformation into essays, images, and projects. The main goal of our research is to find out the factors that influence the process of the designer's selection of basic visual materials when designing a design object.

Basic visual materials, which are also denoted by the term references (materials made by a certain author taking into account the context), are selected by the designer not arbitrarily, but according to the influences that are created on the personality of the designer in a certain socio-cultural environment during life and activity (Rodgers & Strickfaden, 2007). Basic visual materials cannot be separated from the content component, the meaning given to them. References in the form of images (photos, drawings) are mediated carriers of verbal information that is perceived and transformed by the designer in the process of projecting the design object. So, on the one hand, the selected visual material creates an impact on the generation of ideas for the project, and on the other hand, the designer transforms the reference idea, enriching it with his own ideas, and thus creates a new meaning of the projected image (Strickfaden et al., 2015).

The search for basic visual materials is related to the processes of remembering, perceiving, understanding, selecting, analyzing for further transformation and giving new meaning to the images that are significant for the project from the designer's point of view (Adams, 2021). The impossibility of consciously using references without going through separate processes is primarily due to the fact that any basic visual materials include necessary and redundant elements in terms of content (relative to the design task set before the designer). Considering this, it can be considered that the mentioned processes indirectly control the design process of the design object.

The search for references can be considered a concretization of another process – the search for sources of inspiration (Tatham et al., 2011), which encompasses a more global volume of images from the most diverse fields: art; animate and inanimate nature; city life, architecture; books; databases on the Internet; cultural phenomena and people as their participants; artifacts (Özcan & Güzererler, 2018). From this position, the birth of an idea for the next embodiment in the design of a design object can go from finding sources of inspiration through the selection of basic visual components to the actual formation of the design idea. It is worth noting the tendency that the longer and more branched the path between the source of inspiration and the design idea, the greater the conceptual distance, the higher the level of creativity and novelty of the design object (Gentner & Markman, 1997). It is worth noting that the search for sources of inspiration, as well as the activity of selecting basic visual materials, is not a unique phenomenon, the prerogative of the graphic designer's project activity. For other fields in which creativity is of equal importance (for example, visual arts), or for the development of scientific and technical ideas, finding sources of inspiration and working with references can be even more relevant.

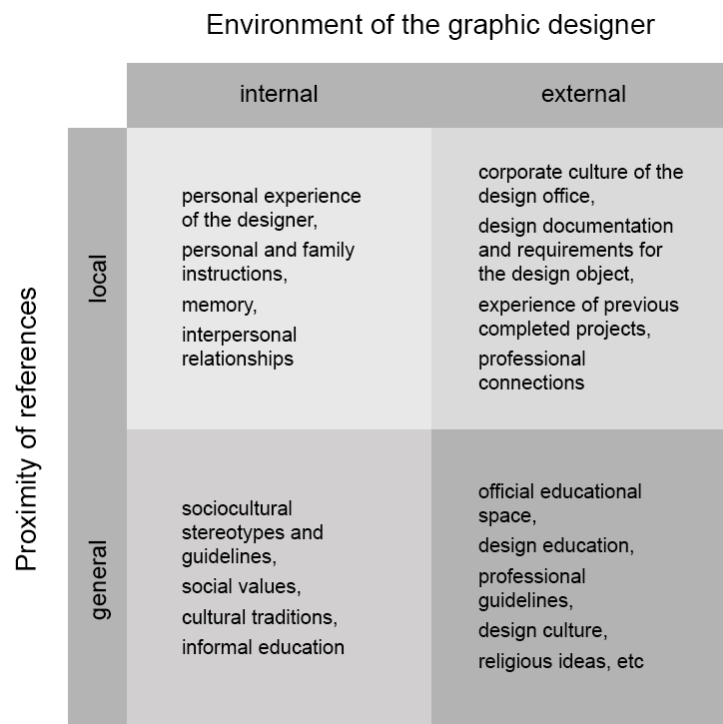
In theoretical and practical studies in the field of design and related fields of social psychology (the field of sociocultural environment), a number of divisions and classifications of references are presented, depending on the context of their formation and existence (Goldschmidt & Sever, 2011; Cardoso et al., 2012; Eckert & Stacey, 2000). The closest to our understanding of the separation of references is a two-plane visualized holistic model of the use (influence, creation) of references by designers, developed by P. Rodgers i M. Strickfaden (Rodgers & Strickfaden, 2007).

In this model, to visualize the connections between the individual and cultural, social in the selection/creation of references, two axes are used, which describe the proximity of references (from close,



local, to distant, universal, universal) and the design environment, the culture of the design studio, as a partial case cultural environment and Western civilization as a whole (ranked from the influences, the context of the innermost environment of the design studio to extra-studio influences).

In the proposed model, the analysis of references is performed from the standpoint of their formation, definition by the environment, society, dependence on the professional environment, and not from the standpoint of the graphic designer as an individual. Therefore, we have proposed an alternative version of the model of influence on the selection, application, and formation of references, in which the main actor is a graphic designer as a person. The model preserves the defined axes, but shifts the starting point of the analysis, thus we get the following model of selection of basic visual materials by the graphic designer for further project activities (Fig. 1).



**Fig. 1. Model of influences on the selection of references by a graphic designer**

*Source: author's own development*

So, conditionally, we can consider the process of reference selection, taking into account the internal and external freedom of the graphic designer when designing the design object, which is due to the degree of specificity of the description of the designed object in the execution documentation or the arbitrariness in decision-making by the graphic designer.

References chosen under the influence of the graphic designer's internal environment are more arbitrary and less predictable in explaining the reasons for their selection, while the basic visual material contains some of the important information required when projecting a design object with predefined characteristics. References selected under the influence of the local immediate environment have the greatest individual color, the maximum characteristics of unpredictability, since their selection is influenced by a variety of internal relationships established throughout life: family, components of personal experience stored in the memory of the graphic designer, conscious and unconscious.

References selected under the influence of the external environment common to a large number of people (stereotypes, instructions, value orientations formed by culture, society, which are manifested

in the daily activities of a graphic designer as a socialized individual) are more predictable, but still saturated with individual characteristics.

More formalized in the search are references for which rational, clearly defined, specific tasks are defined, that is, such basic visual materials, the selection of which is influenced by the graphic designer's external environment. The most specific, with a limited degree of freedom in selection, are the references that the designer must find taking into account the influence of the local external environment, i.e. with the corporate culture of a specific organization (in fact, the corporate culture of each organization, both at the level of a design education institution and at the level of a design agency, distinguished by a set of values, ideas and actions), which provides design services, documentation containing detailed information about the characteristics of the design object, the subsequent material embodiment of the designed object, the personal experience of the designer in the implementation of other projects (Strickfaden & Heylighen, 2010: 122).

Basic visual materials are considered to be the most formalized, the selection of which is mainly influenced by the general external environment, such as educational strategy, design education as a component of the educational space, design culture in its broadest sense, religious ideas, especially those inherent to the vast majority of representatives of the environment in which/for which the process of projecting design objects takes place.

However, the general external environment, even if it does not provide references directly related to the project, with a similar context, has great potential as an intermediary in the search process. Thus, among the tips for finding information for generating ideas by N. Leonard and G. Ambrose, the usefulness of going beyond the research context and analyzing any elements from implemented projects, modern and historical design samples, typography styles, color palettes, materials that at a certain moment can randomly inspire an image, an idea that will already correspond to the context of the current object of design (Leonard & Ambrose, 2013: 19).

In real project activity, a complex thought process is observed to create an internal intangible design (intangible design) based on contemplation, analysis of references relevant to the design task, the selection of which was influenced by a combination of factors from the designer's external and internal environment (environmental factors, regulatory, social, existential, corporate, economic and other factors) (Coxon, 2006). The following significant influences on the selection of references by a graphic designer are obtained on the basis of an analysis of the process of designing advent calendars for the domestic Ukrainian market.

The advent calendar for the domestic Ukrainian market is a countdown calendar, a calendar of waiting for the beginning of the main winter holidays (St. Nicholas, Christmas, New Year), which significantly differs from Western European analogues, where the final waiting period is clearly regulated by the arrival of Christmas, which causes significant and excellent influence on the selection of references by graphic designers.

Another factor that ensures the creation of a variety of offers among the projects of advent calendars for the domestic Ukrainian market is addressing different target audiences (by age, gender, interests), different cultural traditions (it is an indisputable fact that modern advent calendars are used by different people, regardless of religious affiliation), despite the fact that the main demand for advent calendars is directed by parents of children of preschool and primary school age (Borysova, 2021).

The analysis of the published advent calendars of 2017–2021 revealed a tendency towards stereotyping of visual images, conditioned by cultural traditions and fixed social ideas, which at the same time can be considered an expression of identity (Borysova, 2021). Further analysis was aimed at identifying images that are important for the selection of references by the graphic designer in the process of project activities in the development of advent calendars for the domestic Ukrainian market.

Our research involved: future graphic designers who studied in 2018–2023 at the Kramatorsk Vocational College of Technology and Design, Design major, 41 persons, future graphic designers

who studied in 2021–2023 at the Educational and Scientific Institute of Culture and Arts, State institution Luhansk Taras Shevchenko National University, Graphic Design major, 6 persons. Images from the educational projects of these students were used as illustrations in this article. The total number of implemented educational projects of advent calendars was 47 units.

The participants in our study were college students who were not required to use any specific advent calendar design solution. The research was conducted in three parts: firstly, the primary survey, which provided an idea of how references were selected, secondly, it was followed by personal interviews of individual participants, which were transcribed and analyzed for content, thirdly, examples of calendar artifacts were collected for our analysis. The results of our study include the dependence of the final result on the selected references. The essence of the method is that the respondent is offered a series of two or more alternatives and the task is to choose the most acceptable of them. Alternatives are references that interest the graphic designer. They are described using a number of identical signs (characteristics) with different meanings. Since the values of the signs vary independently of each other. This allows you to reveal the weight of each of them in the analysis process. (Gray, 2009). We are aware that each method of data collection has its own advantages and disadvantages and should be applied in studies whose purpose corresponds to the purpose and capabilities of each particular method. The discrete choice method has many advantages in terms of the reliability of the data obtained and the relative simplicity of their analysis. Its disadvantage, however, can be considered the complexity of the research design and the greater time spent on conducting the survey in comparison with classical methods of measuring attitudes.

The theoretical basis for using a discrete choice experiment is the assumption that the respondent in each case chooses the alternative that is the highest level of utility for him. A person is able to accept more of one characteristic at the expense of keeping less of another, that is, to find a balance between two characteristics, taking into account their expediency for himself in a specific situation. Mathematically, the real utility function  $C_n$  can be described as follows:

$$P(a^n | C_n) = P[(V_{an} + E_{an}) > (V_{jn} + E_{jn})] = P[(V_{an} - V_{jn}) > (E_{jn} - E_{an})]$$

$U$  – is the real but unobserved utility of alternative  $a$  for person  $n$ ,

$V$  – observable reference component,

$E$  – unobserved reference component (unexplained choice).

Then the probability that a person will choose alternative  $a$  rather than  $j$  from the set of alternatives is described by the equation:

$$U_{an} = V(X_{an}) + E_{an} = \beta_a + \beta_n X_{an} + E_{an}$$

At the same time, the explained part is an additive part of the function of individual attributes.

According to the descriptive characteristics, the modern Ukrainian advent calendar can be considered an active object of interaction with the user, an object of an artificial environment with informative-game, decorative and communicative functions, which includes the indication of days and additional information, involves the correlation of an event with a sequence of actions and a certain type of transformation, as coloring, destruction. Most modern Ukrainian advent calendars are complete editions.

The basis of the publication set is a poster (on which all the days of the waiting period are marked in a certain rhythmic structure), which is supplemented with stickers as elements of indication of completed tasks (days), task forms, letters, instructions, etc. But since every “consumer” of the advent calendar, using the advent calendar, seeks to feel positive emotions in anticipation of the holiday, especially against the background of modern global problems, this requires new visual solutions.

To solve this task, in the process of searching for references, graphic designers unknowingly, accidentally or intentionally accumulate a certain amount of materials based on internal, mental images

and external influences (Gonçalves et al., 2011), in an aggregate that can look like a mood board (Fig. 2) with references identified according to categories, for use in the design process as visualized knowledge with further: analytical fragmentation of the basic visual material in accordance with the functions to be performed by the ascending image, which is correlated with the tasks and the place of the element in the projected design object, its connections with other elements of the project; refinement, when an already existing reference or its element, which in terms of content corresponds to the design task, is refined, clarified, specified; and/or adaptation, when the existing reference is changed, while preserving some characteristics of the basic visual material, but adjusting to the needs of the project; or interpretation, when the existing reference becomes the basis for a new image with the maximum expression of creativity and novelty in the solution.



**Fig. 2. Moodboard. Author Hanna Kozachenko (student)**

So, the deer does not have a stable perception as a component, which can take place when designing an advent calendar for the domestic Ukrainian market. Depending on the personality of the designer and the task to be performed, deer can be sought out as references and imagined as: a fawn, a child who came to say hello, play with the main actors defined by the concept of the advent calendar (influence of the local inner environment of the designer); a doe (often with fawns), a gentle mother who brings children into the world, takes care of them, brings them up, gives a feeling of comfort and celebration (the influence of the designer's local or general inner environment); a deer, a representative of the flora of the forest-steppe zone of Ukraine, a noble and infrequent guest (the influence of the designer's general external environment); a Christmas deer accompanying the journey of the main character of the Christmas holidays in the Western European tradition of Santa Claus (influence of the designer's local external or general internal environment); and go through the process: *interpretations*, if the idea of a fawn and/or a fawn is embodied; *refinements or adaptations*, if a red deer is embodied; *adaptations or interpretations*, if the Christmas deer is embodied (Fig. 3).

As another example of internal processing of visual material by a graphic designer, we can cite a frequently used element of New Year's holidays – a light garland (Fig. 3, 4). The visualization of the light garland, according to analytical fragmentation, is significantly dependent on the general idea of the project and the personal preferences of the designer, and can be manifested in a funny light rib-





**Fig. 3. Christmas deer. Author Yelyzaveta Dzhyhola (student)**

bon that mice play with (influence of the local inner environment of the designer), in the illuminated straps of Santa’s reindeer harness (influence the general internal environment of the designer), an analog light garland decorating the wall with boots as indicators of the approach of the holiday (the influence of the general external environment of the designer).

So, we predicted that the references and the final result have a connection. The question was how strong this connection is and how the internal and external interact in it. That is why we were not interested in individual graphic designers. More precisely, we were not interested in individual graphic designers, since they are an integral part of the group we are studying. We can study the advent calendar activities of a certain graphic designer, but not because we want to know more about the designer “Prokopenko”, but because we think that by observing the designer “Prokopenko” we



**Fig. 4. Lighting garlands**

*Authors (students) Iryna Ryhun (left), Kateryna Behovcha (right)*

can get a better idea of future graphic designers. designers in general and we can learn to predict their activities. From this point of view, our task is to study groups of specialists, such as a set of higher education graduates (future graphic designers), graphic designers who have not received formal education, and graphic designers who already have many years of professional experience. In order to study the influence on the selection of references by future graphic designers, we collected data on individual higher education applicants and summarized them in data tables to summarize information about the group as a whole.

Very good solutions are often created at the level of results of analytical work, because the source of this knowledge is the very graphic designers who created the future project. Now the most important methods of analytical work will be briefly discussed:

a) Personal interviews are a method that allows for in-depth research, which is conducted with the participation of the researcher and the respondent.

b) Survey research – research aimed at studying a certain problem in a wider group of respondents. Unlike face-to-face interviews, surveys aim to help explore the opinions of a wider group of respondents.

c) Segmentation research – research, the main purpose of which is to impose external cognitive categories on respondents.

Based on the results of work with each respondent, a survey was conducted during which it was found out what guided each of them when selecting references. Attention was also drawn to how the own project of the advent calendar was implemented. We aimed to determine the dependence of the choice of alternatives on such characteristics as the proximity of references and the environment of the graphic designer. The respondents' questionnaire included questions about the designer's internal and external environment, and an explanation of the selection of references. When explaining the selection of references, the respondent had to choose answer A (the proximity of references is local) or B (the proximity of references is general), or refuse the explanation. Thus, the respondent had three alternatives. The theoretical basis for using a discrete choice experiment is the assumption that the respondent in each case chooses the alternative that is the highest level of utility for him.

The first step in the research was to determine the proximity of the references and the environment of the graphic designers. It was decided to analyze the influence of references on the final result – the advent calendar. Each of the attributes has several values (model). The more values and attributes used in the analysis, the more complex the research. Empirical studies using this method recommend using no more than 10 descriptive attributes and no more than 20 questions for each respondent.

We took into account the results of research that the high complexity of the questionnaire can affect the conscientiousness of people when filling it out. In our case, two attributes were used. This gave us the opportunity to obtain a database with recorded information about what each of the respondents was guided by when selecting references.

The next step was to determine the presence of a correlation between the proximity of references and the graphic designers' environment as attributes that determine the graphic designers' decision regarding the final design of the advent calendar (Table 1).

Table 1

**Correlation of influences on the selection of references by a graphic designer**

	<b>The graphic designer's environment (internal)</b>	<b>The graphic designer's environment (external)</b>
The proximity of references (local)	0,584	0,155
The proximity of references (general)	0,359	0,645

Spearman's correlation coefficient ( $\rho$ ) (The proximity of references (local) and The graphic designer's environment (internal)) is 0.584. The connection between the studied features is direct, the strength of the connection according to the Chaddock scale is noticeable. The number of degrees of freedom ( $f$ ) is 19. The critical value of Spearman's test with this number of degrees of freedom is 0.435.  $\rho$  approximate  $> \rho$  critical, the dependence of signs is statistically significant ( $p < 0.05$ ).

Spearman's correlation coefficient ( $\rho$ ) (The proximity of references (general) and The graphic designer's environment (external)) is 0.645. The connection between the studied features is direct, the strength of the connection according to the Chaddock scale is noticeable. The number of degrees of freedom ( $f$ ) is 19. The critical value of Spearman's test with this number of degrees of freedom is 0.435.  $\rho$  approximate  $> \rho$  critical, the dependence of signs is statistically significant ( $p < 0.05$ ).

Therefore, the results were analyzed as a comprehensive indicator. The analysis was performed according to the critical values. The prediction that formal education increases the probability of choosing references presenting established cultural traditions and social values was confirmed. It should be noted that the references selected by the authors under the influence of the local immediate environment had the greatest individual color, the maximum characteristics of unpredictability, since their selection was influenced by the variety of internal relationships established during life.

**Conclusion.** The search for basic visual materials when designing design objects is characterized by complexity, even integrity, especially in the context of the design structure of the advent calendar. What we see in the perspective of time, ideas, values. In graphic design, an idea is important from which a design concept and finally a viable solution can emerge. We came to the conclusion that the implementation of the idea depends on the factors that influence the process of selection of basic visual materials by the designer when designing the design object.

It is the development of the idea based on the search for basic visual materials that is important for the design of the design object. Directly in the practice of graphic design, the relationship to the system of basic visualization techniques is significantly contradictory. It is known that an important principle of the professional activity of a graphic designer is the variety and uniqueness of graphic solutions. But many signs testify to the universality and systematicity of the language used in graphic design. We are not referring to the usual pictorial means that, falling into the stream of fashion, are spread in the graphics of many countries, but also to those single norms of the internal organization of the visual text that are inherent in the language of graphic design as a whole. The existence of such norms is confirmed, for example, by the very possibility of using certain symbols and colors determined by the graphic designer's external environment. It is certain that certain mechanisms of visual thinking are the basis of accurate decisions.

Without exhausting the variety of expressive means of visual language, the system of basic techniques for finding basic visual materials in the design of design objects provides an operational basis, beyond the limits of which a purposeful solution to design tasks of any complexity is impossible.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-10>

## IMPLEMENTATION OF INTERDISCIPLINARY CONNECTIONS IN THE PROCESS OF PROFESSIONAL TRAINING OF STUDENTS

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**Abstract.** Interdisciplinary connections (interdisciplinarity) is a universal concept used by teachers of all specialties. The article presents a study of the essence of the concept of “interdisciplinary connections”, which we consider as a means of combining theoretical foundations and/or practical methods and techniques of various disciplines, with the aim of improving the quality of the educational process and their effective further use by students in the process of future professional activity.

The specified term, as opposed to the term “integration”, must be used during the teaching of basic disciplines in the educational program of specialized secondary education, which include natural sciences. They are involved in the process of forming the professional competence of college students, through the use of the STEM approach to education. Its implementation in the process of training students of higher and professional pre-higher education during the period of martial law prepares them for future professional activity and labour protection in this field. It was also determined that issues needed to understand information about the war situation and ensuring a safe existence during the war, sustainable development of society, the role of modern assets in the field of science and technology, and providing equal access to employment in the STEM field require additional involvement.

**Key words:** interdisciplinarity, interdisciplinary connections, STEM.

**Introduction.** Interdisciplinary connections (interdisciplinarity) is a universal concept used by teachers of all specialties, since there is no academic discipline that is completely separated from others, which can be explained by the integrity of the cognitive process itself and the unity of the systems surrounding a person.

The issue of their implementation is not new, but the change in the paradigm of the education process causes a change in approaches to their implementation, accordingly, the introduction of a competency-based approach to the education process in Ukraine stimulates new searches based on the work of both foreign and Ukrainian scientists who conducted research at the intersection areas of competence and interdisciplinarity, in particular M.R. Bañuls, I.M. Bergom, K. Bollard, S.G. Clark, A.M. Claus, J.M. Harbor, J.T. Klein, D.B. Knight, L.R. Lattuca, B.J. Novoselichd, J. Parker, G. Song, T. Stone, I.M.G. Trigueros, R.L. Wallace, Z. Wang, B.S. Wiese, S.U. Honcharenko, I.V. Kovalenko, S.P. Kozhushko, V.V. Kozlov, I.A. Kolodiy, A.M. Kolot, M.I. Kuznetsov, T.S. Mazepa, I.V. Milash, O.M. Muzalyov, V.G. Omelyanenko, O.A. Priyatelchuk, L.P. Semko, V.D. Syrotyuk, S.M. Stadnichenko, L.A. Teryaeva, T.V. Tomashevskaya, N.M. Chernenko, E.B. Shcherbina and others. Despite the fact that this issue is being actively developed, both by theorists and practitioners, the debate about the terminology used, the choice of technology for the implementation of interdisciplinary connections, etc., does not subside.

The purpose of the work is to consider theoretical and practical approaches to the process of implementing interdisciplinary connections in the process of professional training of students.

The tasks of this study are:

1) To consider the concept of “interdisciplinary connections” and interdisciplinarity.

2) To substantiate the directions of implementation of interdisciplinary connections in the process of studying natural sciences by professional junior bachelors during the period of martial law.

**Materials and methods.** In the process of research, such general methods as analysis, synthesis, comparison, generalization were used. In the process of studying the practical experience of natural science teachers, such experimental methods as observation and comparison were used.

**The results and discussion.** It should be noted that there are differences in terminology in the scientific and methodological literature related to the issues of research, in particular, ambiguous terms such as “interdisciplinary” and “interdisciplinary connections”, “integration” and others are used.

Let's consider them in more detail.

To begin with, let's pay attention to the fact that, according to the results of a preliminary analysis of literary sources, researchers from the European Union, Canada, the USA, and Australia use the adjective “interdisciplinary”, which describes the interaction between two or more different disciplines, from the exchange of ideas to the mutual association of concepts, procedures, methodology, data, organization of research and training (Berger, 1972). Educators use it to describe the process or quality of education. In this sense, the noun “interdisciplinarity” is used to indicate the cause or its result of the educational process (Peterson, 2008, p. 43). Scientists of Ukraine and near abroad use the more detailed term “interdisciplinary connections” to indicate the need to involve knowledge and methods from other disciplines in the education process. In particular, S. U. Goncharenko defines interdisciplinary connections as “mutual coordination of educational programs determined by the system of sciences and the didactic goal” (Goncharenko, 1997, p. 210). He emphasizes that the result of their implementation is specific knowledge of the students and their involvement in operating with general scientific cognitive methods (abstraction, modeling, analogy, generalization, etc.). A similar opinion is observed in the dictionary-handbook of professional pedagogy edited by A.V. Semenova, where they are presented as logical connections between educational disciplines, which help to use one's own knowledge in the process of their education to form a holistic view of natural phenomena (Semenova, 2006). V.V. Kozlov and others call interdisciplinary connections a means of resolving the contradictions existing in the education process between the separate assimilation of knowledge of educational disciplines, their further synthesis and application during practical training and in professional activities (Kozlov et al., 2018). Therefore, interdisciplinary connections are a means of combining theoretical bases and/or practical methods and techniques of various disciplines, with the aim of improving the quality of the educational process and their effective further use by students in the process of future professional activity.

Next to the term “interdisciplinary connections” the concept of “integration” is used. In a general sense, it means the combination of disparate things, events or processes in order to improve their full or partial understanding (Clark&Wallace, 2015). The field of integration is broader than interdisciplinarity and interdisciplinary connections. This term is used to refer to activities aimed at overcoming differences between the process of disciplinary and professional training (Klein, 2005). It is implemented by identifying interdisciplinary connections and defining relevant tasks, distinguishing between horizontal (between different disciplines) and vertical (within the study of a discipline according to a spiral curriculum) integration (Costa et al., 2018; Humenna, 2019). In our opinion, the term “integration” should be used when studying professional disciplines, specialized subjects and special courses. And when studying basic disciplines under the educational program of specialized secondary education, which include natural sciences, it is appropriate to use the term “interdisciplinary connections”, as only elements are added that combine them with future professional activities and within the framework of topics provided by the recommendations of the Ministry of Education and Science of Ukraine.

Let's consider the role of participants in the process of forming interdisciplinary connections.

It is common knowledge that only trained teachers can exert an organized pedagogical influence on students. In the process of mixed and distance learning, the introduction of competence-based learning, the ideas of NUSH, the role of teachers has changed. They have turned into facilitators and moderators (Sofii et al., 2018, p. 81), which by establishing successful communication between learners, focused on the formation of competence, which manifests itself in the process of their practical activity. Accordingly, the process of forming interdisciplinary connections is considered in three aspects (Tverezovska & Sydorko, 2012):

- 1) general pedagogical, which sees intersubject connections as a condition and means of forming interdisciplinary, general and professional competences;
- 2) psychological – generalization of the process of formation of interdisciplinary knowledge, skills and attitudes that form the basis of interdisciplinary competence;
- 3) methodological aspects, which consider them as a condition and a means of modifying educational technologies used in the educational process.

According to this approach, students are subjects in the broadest sense of the word. We will remind you that “a subject is a person, an organized group of persons, a social, ethnic and political community, society as a whole, carrying out their own activities aimed at the practical transformation of objective reality, the theoretical and spiritual-practical development of objective reality” ( Shinkaruk et al., 2002: 613). From the point of view of philosophy, the students, as subjects of implementation of interdisciplinary connections, should possess such features as:

- 1) objectivity, which consists in the fact that students form interdisciplinary competence only in the process of multidimensional contextualized activity;
- 2) the consciousness that guides students in an interdisciplinary environment, determines the purpose of their implementation;
- 3) student activity, which on the one hand stimulates their activity, and on the other – encourages the teacher;
- 4) the will, which is an integral part of the process of training the students.

Therefore, in the process of implementing interdisciplinary connections, teachers, being in the role of facilitators and moderators, should stimulate the acquisition by students of such traits as objectivity, consciousness, activity and will. On the one hand, this is a condition for the success of this process, and on the other hand, it is one of the results of the implementation of interdisciplinarity.

In the stereotypical sense, interdisciplinarity is perceived as a process of knowledge transfer, but it is not limited to them, the teacher must use interdisciplinary methods, which allows to classify interdisciplinary connections into (Bugerya, 2009):

- 1) interdisciplinary connections that explore a common object;
- 2) manipulate one theory or law;
- 3) use the same research method or technique;
- 4) apply a joint approach to activities in the educational process.

The specified classification removes the priority of knowledge and orients the teacher in the process of implementing interdisciplinary connections, through the use of interdisciplinary methods, to the formation of competence, which is a requirement of the modern educational process.

When designing the process of implementing interdisciplinary connections, it is necessary (Man-Ho Lam, 2022):

- 1) to formulate clear and precise main educational goals based on the principle of purposefulness;
- 2) to consider the specific positioning of the curriculum in the middle of the educational institution, taking into account cross-cutting content lines and the future professional activity of the students;
- 3) adhering to the principle of continuity, interdisciplinary connections should be coordinated with professional disciplines;

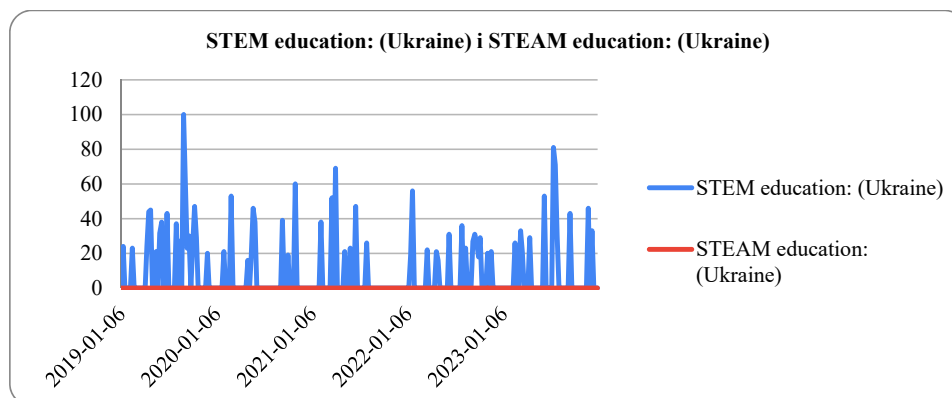
4) to coordinate them with the general learning outcomes and age characteristics of the students;  
 5) to develop a consistent and integrated structural design, each inclusion of interdisciplinarity should be thought out;

6) predict further interdisciplinary initiatives in which the student may be involved in the future.

Therefore, in the process of implementing interdisciplinary connections, the teacher must conduct preparatory work, which consists in formulating his clear and precise goals, studying the purpose of the educational discipline and its connection with professional ones. It requires a coherent and integrated design that involves the use of interdisciplinary methods.

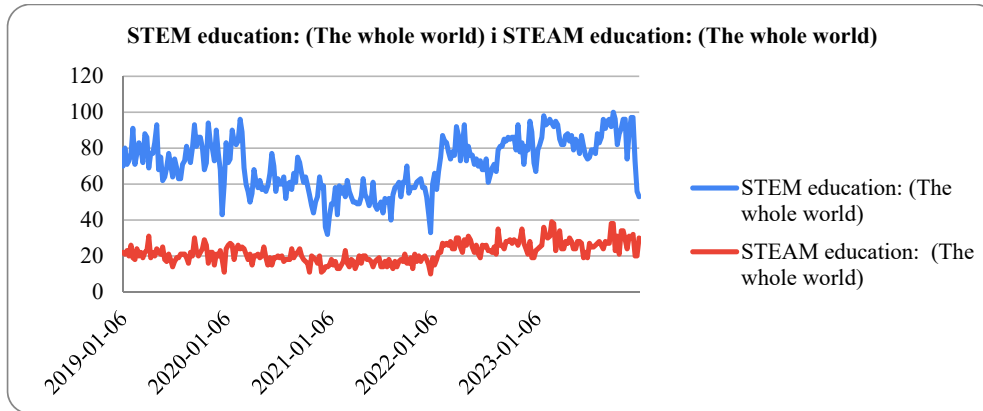
While studying at the college, students study basic disciplines, the teachers of which must implement interdisciplinary connections with professional ones. This requires choosing a pedagogical technology that would be effective. In order to solve this problem, we conducted oral interviews with teachers of natural sciences at the Kryvyi Rih Applied College of Trade and Hotel and Restaurant Business, studied the experience presented by them during pedagogical and methodical meetings, the work of the advisory and training club “Pedagog”, which operates in an educational institution, during regional meetings of teachers of natural sciences, during participation in scientific and practical conferences and studied practical tools presented in scientific and methodological sources. The results of the study demonstrate that STEM is one of the approaches to the process of implementing interdisciplinary connections that teachers consider effective and actively implement in the process of educational activity. It is well known that the acronym “STEM” stands for “Science (Natural Sciences), Technology, Engineering and Mathematics”. It is used to refer to educational or research activities aimed at solving real-world problems that are known to be at the boundaries of disciplines (Wang et al., 2011).

One of the alternatives to STEM is STEAM education, which is essentially STEM, but supplemented with elements of art and creativity (Perignat&Katz-Buonincontro, 2019). We compared the number of unfiltered samples of actual searches for the keywords STEM and STEAM education (in their English version) on Google using the Google Trends service. It should be clarified that only the search terms “STEM-education” and “STEAM-education” can be equally compared, since the static data will be distorted by queries related to the STEAM game of the same name. According to the results of the analysis, the number of requests related to STEM significantly exceeds the number of requests related to STEAM education, both among Ukrainian users (see Fig. 1) and worldwide (see Fig. 2). It should be noted that the number of requests is not a qualitative characteristic, it only characterizes interest, therefore the sample is only the result of a preliminary analysis and requires more serious theoretical research, however, in addition to the above, STEM can be given priority.



**Fig. 1. The results of comparing the number of requests for the keywords “STEM education: (Ukraine)” and “STEAM education: (Ukraine)” using the Google Trends service (request from 01.06.2024)**





**Fig. 2. The results of comparing the number of requests for the keywords “STEM education: (The whole world)” and “STEAM education: (The whole world)” using the Google Trends service (request from 01.06.2024)**

Since the process of training professional junior bachelors is also aimed at solving real problems that arise or may arise for students during their future professional activities, STEM education becomes a means of forming and developing their professional competence. The importance of STEM education for future professional self-realization is emphasized by N.I. Polihun et al., who in a broad sense define it as a “pedagogical technology for the formation and development of mental, cognitive and creative qualities of students, the level of which determines the competitiveness of an individual in the modern labor market” (Polihun et al., 2019: 6). N.O. Goncharova understands STEM education as a series or sequence of courses or training programs that require the formation of complex technical skills, in particular the application of mathematical knowledge and scientific concepts, which prepare students for successful employment, further education, or both (Goncharova, 2018).

The end result of the pedagogical influence of science teachers is a competent learner in a field that combines natural sciences, engineering, technology, and mathematics. Such a student, according to UNESCO's definition, must possess “knowledge – what” (knowledge, attitudes and values related to disciplines) and “know-how” (skills to apply knowledge taking into account ethical attitudes and values necessary in the process of professional activity) (White, 2014).

The Global STEM Alliance (GSA) Core STEM Education Curriculum presents the core and supporting STEM competencies needed to thrive in today's workplace. In addition to content knowledge, core competencies include critical thinking, problem solving, creativity, communication, collaboration, data literacy, and digital literacy. Supporting attributes, those that contribute to self-development and improvement are STEM mentality, perseverance, freedom of will, social and cultural awareness, leadership, ethical attitude (Childress et al., 2016).

From the above, it can be concluded that STEM competence and related competencies are not formed spontaneously. Purposeful activity of science teachers is necessary. They can realize the full potential of STEM through the use of training courses focused on the future professional self-realization of the students.

To design a system for implementing interdisciplinary connections in the process of STEM education at the Kryvyi Rih Applied College of Trade and Hotel and Restaurant Business, the system approach ADDIE (Analysis, Design, Development, Implementation, Evaluation) was used, which is oriented to the needs of students (González&Quiroz, 2019) of the specialties “Food technologies”, “Hotel and restaurant business”, “Accounting and taxation”, “Entrepreneurship and trade”. Due to the restrictions associated with the emergence and further spread of the coronavirus infection (COVID-19), the introduction of martial law in Ukraine, most types of educational activities

were planned and conducted in an online format, and some, if possible, were conducted face-to-face in safe conditions.

Using the above-mentioned theoretical principles of implementation of interdisciplinary relations with the help of STEM, the following stages were covered:

1. Analysis – preliminary needs of students were established, educational goals were determined, taking into account their professional orientation and additional needs for successful self-realization in the modern world. Since training is carried out in 5 specialties at the the Kryvyi Rih Applied College of Trade and Hotel and Restaurant Business, at this stage, teachers of special disciplines and masters of industrial training, a practical psychologist, etc. were involved.

2. Design – based on the data of the previous stage, educational materials for students containing STEM elements were created.

3. Development – courses are placed on the ICloud platform, extracurricular work is planned.

4. Implementation – continuous access to work with online courses was provided, extracurricular activities were held.

5. Evaluation – evaluation of the quality and effectiveness of the educational process was carried out, student feedback was analyzed.

We try to increase the effects of STEM implementation by using various non-standard forms of classroom and extracurricular work, project activities, relying on practice, flipped learning technology, providing support to students with the help of social networks, using online services and making.

The process of introducing interdisciplinary connections is cyclical. Educational and teaching-methodical materials created as a result of designing a course based on the ADDIE model require constant updating and modification, changing forms and additional subtopics that reveal the potential of STEM.

Let's consider the areas of renewal of STEM education related to martial law.

For the past 5 years, at the forefront of the process of learning STEM disciplines, the main issues were related to natural sciences, technologies, engineering and the future professional activities of students, labor protection in the industry, traditional additional topics that are considered are:

- Life safety;
- Sustainable development;
- Modern development of science and technology;
- Gender equality.

The introduction of martial law in Ukraine made adjustments to the educational process as a whole. They were reflected in the process of implementing interdisciplinary connections. According to the results of our observations, surveys and questionnaires of students, topics related to the academic discipline “Defense of Ukraine” needed additional involvement. The elements related to it are reflected in the courses of natural sciences.

Thus, the main motive for the introduction of interdisciplinary connections by means of STEM in the process of training students of higher and professional pre-higher education in the period of martial law remains their future professional activity and labor protection in this field. The issue of the functioning of military equipment (air defense, missiles, weapons, etc.), which is necessary for understanding information about the military situation, ensuring a safe existence during the war (disciplines “Defense of Ukraine”, “Safety of life” and others), sustainable development, the role of modern assets in the field of science and technology and ensuring equal access to employment in the field of STEM requires additional involvement.

The discussion. Some statements presented in the study require additional consideration. In particular, it should be clarified that the process of implementing interdisciplinary connections does not detract the importance of interdisciplinarity, but on the contrary, “interdisciplinarity welcomes disciplinarity, it requires a strong disciplinary foundation” (Clark&Wallace, 2015: 10). Disciplinary knowledge, methods and approaches become the tools used.

Another debatable issue is the issue of choosing an approach to the implementation of interdisciplinary connections. In the study, we favored STEM over STEAM, but the study of their advantages and disadvantages is still ongoing. In particular, a detailed development, evaluation of competence and competencies formed for each of the approaches is necessary.

The choice of additional topics to be covered is also subject to discussion. They demonstrate our subjective vision of students' needs, formed on the basis of previous research and pedagogical experience. It is quite clear that they are not universal for students of educational institutions with a different specialization, a different age category. Their list will be completely different.

Conclusions. Interdisciplinary connections are a means of combining theoretical foundations and/or practical methods and techniques of various disciplines in order to improve the quality of the educational process and their effective further use by students in the process of future professional activity. In the process of their implementation, teachers, in the role of facilitators and moderators, should stimulate the students of such traits as objectivity, consciousness, activity and will, which, on the one hand, is a condition for the success of this process, and on the other hand- one of the results of the implementation of interdisciplinarity. During the preparatory stage, the teacher must formulate clear and precise goals of the given process; study the purpose of the educational discipline and its connection with professional ones. The process of applying interdisciplinary connections requires a consistent and integrated design that involves the using of interdisciplinary methods.

One of the means of implementing interdisciplinary connections in the process of science education of students of institutions of professional preliminary higher education is the STEM approach to education. The main motive for its introduction into the process of training students of higher and professional pre-higher education in the period of martial law is their preparation for future professional activity and labor protection in this field. Additional engagement is needed for issues related to understanding information about the war situation, ensuring a safe existence in times of war, sustainable development of society, the role of modern assets in the field of science and technology, and ensuring equal access to employment in the field of STEM.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-11>

## OPEN SOURCE AND PROPRIETARY SOFTWARE FOR AUDIO DEEPPAKES AND VOICE CLONING: GROWTH AREAS, PAIN POINTS, FUTURE INFLUENCE

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**Abstract.** The article is dedicated to exploring the rapidly growing field of audio deepfake and voice cloning technologies. It examines the dual pathways of development in open-source and proprietary software, identifying key areas of growth, challenges faced by developers and users, and the potential impact these technologies may have on various sectors. The relevance of this article lies in its timely examination of a rapidly evolving technology that has significant implications for privacy, security, and content authenticity in the digital age. The research results show that audio deepfakes signify a major leap forward in our ability to generate and modify audio recordings, enabling the creation of highly convincing imitations of specific voices. This technology spans three main categories: imitation-based, synthetic-based, and voice cloning, each offering unique applications and introducing distinct challenges. These advancements have opened up new possibilities in fields such as entertainment, customer service, and security but also bring to light serious ethical and security considerations. The imperative for careful oversight and the development of regulatory frameworks to prevent misuse is clear. The ecosystem of audio deepfake technology features a wide range of open-source and proprietary software, each designed to meet specific requirements. Prominent solutions like Resemble.ai, Descript, and CereProc, among others, cater to diverse needs from entertainment to multilingual voice cloning. Alongside these, open-source projects like FaceSwap and Real-Time Voice Cloning offer valuable resources for innovation, emphasizing the importance of responsible usage and ethical development. The trajectory of audio deepfakes is marked by both promising prospects and formidable challenges. The potential for these technologies to revolutionize storytelling, create personalized experiences, and support educational initiatives is immense, facilitated by ongoing advancements in AI and the growth of open-source communities. However, the concerns surrounding ethical use, the demand for computational resources, and the challenge of achieving linguistic diversity underline the need for comprehensive ethical guidelines and sophisticated detection mechanisms. Navigating the future of audio deepfakes will require a balanced approach, weighing their transformative potential against the risks they pose. The practical significance of audio deepfakes extends into research and development, where they can be used to study speech disorders, aid in voice restoration for individuals who have lost their ability to speak and explore new forms of human-computer interaction. As the technology matures and becomes more accessible, its practical applications are expected to expand, potentially transforming how we interact with digital content and each other in virtual environments.

**Key words:** open source, audio deepfakes, voice cloning, software.

**Introduction.** The trajectory of deepfake technology development is closely intertwined with broader trends of the Fourth Industrial Revolution, characterized by the convergence of digital, biological, and physical worlds and the emergence of breakthrough technologies such as artificial intelligence.

The current digital information landscape witnessed a rapid expansion of the artificial intelligence sector: in 2021, the AI applications market was valued at 93.5 billion USD, and today, it is estimated at 245 billion USD, and by 2030, it is projected to reach 1.7 trillion USD, accounting for an annual growth rate of 38%. AI-based communication technologies, particularly audio deepfakes and voice cloning, are gaining particular relevance (Whittaker et al., 2023).

Audio deepfake technology, as a notable application in the AI-driven communication sector, can blur the lines between reality and fiction, creating both innovative opportunities and severe chal-

lenges in various fields, especially on online communication platforms where deepfakes are becoming increasingly prevalent.

Industry reports indicate a sharp increase in fake content: over 100 million fake videos circulated online in 2020, which, between 2017 and 2020, amassed over 5.4 billion views on YouTube alone. This growing presence underscores the increasing influence of deepfakes on the digital communication landscape (Whittaker et al., 2023).

Against this backdrop of rapid growth, an academic and practical discourse around audio deepfakes is developing, with new discussions emerging about their potential applications and the ethical considerations they bring. However, a consensus on these technologies' future, challenges, and promising applications is not yet clearly defined. To understand the future development of the audio content sphere, it is essential to examine expert and scientific research worldwide, as innovations can come from any direction. Z. Almutairi and H. Elgibreen (2022) highlight modern methods for detecting audio deepfakes, focusing on the challenges and future directions in this field and indicating the need to develop effective tools to combat audio manipulations. Z. Khanjani, G. Watson, and V. Janeja (2023) also explore audio deepfakes, reviewing existing approaches and challenges in this area. M. Broz (2023) and T. Kamunya (2023) focus on analyzing software for creating audio deepfakes, including open-source tools, and highlight the top tools available in the market. It allows for assessing the potential and limitations of existing technologies in this field. Authors such as B. Fauve (2023) and E. Hays (2023) consider the broader implications of audio deepfakes, including societal and ethical aspects of these technologies, emphasizing the importance of understanding the potential impact of audio manipulations on various aspects of life. Researchers such as A. Naitali, M. Ridouani, F. Salahdine, and N. Kaabouch (2023), as well as L. Whittaker, R. Mulcahy, and K. Letheren (2023), investigate methods for generating and detecting deepfakes, highlighting the need for developing effective means of protection against manipulative audio materials. J. Kietzmann, A. Mills, and K. Plangger (2020) examine the future of advertising and branding in the context of deepfakes, pointing to potential changes in the perception of reality and its impact on consumers.

As deepfake technologies continue to evolve, they represent a significant potential for innovative research in the current era.

**Main part.** The purpose of the article is to provide a comprehensive overview of the software and technologies used in the field of audio deepfakes and voice cloning, and to highlight the main challenges and future prospects of these technologies.

To achieve this goal, the following points will be covered:

- 1) define what audio deepfakes are and their types;
- 2) review the main software used for their creation;
- 3) determine the significance of open-source technologies and list the programs that have been developed to date;
- 4) highlight the issues associated with the use of audio deepfakes;
- 5) identify the prospects of this technology.

**Results and discussions.** In recent years, the digital content world has seen the development of technologies capable of reproducing authentic voices, including imitating, cloning, and distorting them. Initially created for benevolent purposes, these technologies have also been illicitly appropriated for spreading false information globally via audio media. Such misuse has raised concerns about "audio forgeries," also known as sound alterations, which can now be easily created using ordinary smartphones or desktop computers. This development has sparked global concern regarding cybersecurity, highlighting the potential negative consequences of using audio forgeries. Despite this innovation's advantages, Audio Deepfakes (AD) extend far beyond simple textual communication or hyperlink exchange. They can be utilized for voice-based logical access forgery schemes, potentially affecting public sentiments through propaganda, defamation, or terrorist acts. Given the vast volumes

of voice data transmitted daily over the Internet, distinguishing authentic recordings from fraudulent ones is challenging (Almutairi & Elgibreen, 2022).

**The definition of audio deepfakes.** Audio deepfakes are artificially created or manipulated audio recordings that convincingly mimic a specific individual's voice, creating the illusion that they are saying something they actually did not. Initially developed for business purposes, such as enhancing the realism of audiobooks by reproducing soothing human voices, this technology has found more controversial applications.

There are three main categories of audio forgeries, each distinguished by the method of creation:

1) Imitation-based forgeries involve transforming one voice into another to create the impression that another person is speaking. It can be achieved in various ways, including engaging individuals who can accurately imitate the target speaker's voice. More sophisticated methods involve using digital algorithms, such as Efficient Wavelet Masking (EWM), to alter the characteristics of the original audio signal to match the target voice. This process involves recording both the original and the target voice with similar characteristics and then transforming the original audio to replicate the speech patterns of the target voice, resulting in a forged audio clip that, to an untrained ear, might sound almost indistinguishable from a genuine recording (Almutairi & Elgibreen, 2022).

2) Synthetic-based forgeries: Text-to-speech (TTS) forgeries are generated by converting text into realistic spoken audio. The process typically involves three main stages: text analysis, where the input text is converted into linguistic features; acoustic modeling, which uses these features to generate speech sounds; and finally, a vocoder, which synthesizes actual speech. Advanced TTS systems like Tacotron 2, Deep Voice 3, and FastSpeech 2 are known for creating natural-sounding speech. These systems require a database of clean, structured audio recordings and corresponding textual transcripts to train the model, which generates the synthetic voice (Almutairi & Elgibreen, 2022).

3) Voice cloning: This category involves the direct reproduction of the recorded speech of the target individual, often used in malicious contexts to deceive listeners. There are two main sub-types within this category: far-field detection, where the target individual's voice recording is played through a device, such as a telephone handset, to simulate a live conversation, and cut-and-paste detection, where different audio segments of the victim's speech are stitched together to create a new, fraudulent message (Almutairi & Elgibreen, 2022).

Depending on their specific objectives, various types of audio deepfakes are employed. For instance, imitation-based deepfakes might be used in entertainment to protect the privacy of an original voice by transforming it to sound like another. Synthetic-based or Text-To-Speech deepfakes could be utilized in customer service to provide real-time, natural-sounding responses. Replay-based deepfakes might be used in security testing to assess the robustness of voice recognition systems.

**Software for creating audio deepfakes.** Software for creating audio forgeries employs advanced technologies to generate synthetic sound that mimics real voices with remarkable accuracy. Despite its fraudulent uses, this innovation has immense potential in various fields, transforming content creation, marketing, and branding. Let's consider the main advantages and prospects of using modern technologies for creating audio forgeries.

In the rapidly changing landscape of the business world, a multitude of software solutions are continuously being developed and deployed to meet evolving business needs. As of 2024, the realm of audio manipulation and creation has seen significant advances, with a variety of tools gaining prominence for their innovative features. Among these, notable software includes Resemble.ai, renowned for its applications in the entertainment industry; Descript for its podcasting and audio editing capabilities; and CereProc, distinguished for its multilingual voice cloning. Each tool is tailored to specific industry requirements, offering solutions from fast voice synthesis with real-time voice cloning to specialized applications in video games and voice-over projects with Replica Studios (Broz, 2023).

Table 1

**The main advantages and perspectives of using modern technologies for creating audio deepfakes (Kamunya, 2023; Kietzmann et al., 2020)**

<b>Advantages</b>	<b>Overview</b>
Innovative Storytelling	Enables more creative storytelling techniques in podcasts and audiobooks.
Efficient Content Updates	Allows easy updates to existing audio content, saving time and resources.
Educational Tools	Enhances language learning and educational materials with realistic voice simulations.
Research and Development	Assists in linguistic and psychological studies by providing diverse audio samples for analysis.
Personalized Customer Experiences	Voice cloning can enable brands to offer highly personalized experiences to their customers. For instance, using a customer's preferred voice for virtual assistants or customer service bots can make interactions more engaging and comfortable, leading to increased customer satisfaction and loyalty.
Brand Mascots and Voices	Brands can create or clone distinctive voices for their mascots or spokespersons, ensuring consistency across various marketing channels. This not only strengthens brand identity but also improves brand recognition among consumers.
Multilingual Content Creation	Audio deepfake technologies facilitate the creation of multilingual content without the need to employ multiple voice actors and native language speakers. This can significantly expand a brand's global reach and resonance with diverse audiences while maintaining a consistent brand voice.

Let's look at the top 10 programs and online applications that allow you to create audio products based on audio deepfakes.

Table 2

**Top applications that allow the creation of audio products based on audio deepfakes (Broz, 2023)**

<b>Program</b>	<b>Focus Area</b>	<b>Price Range</b>
Resemble.ai	Entertainment	\$99/month – Custom
Descript	Podcasting & Audio Editing	Free – Custom
CereProc	Multilingual Voice Cloning	\$499.99
Respeecher	Filmmaking & Video Game Design	\$200/month
iSpeech	Customer Service & Video Game Design	Not Specified
ReadSpeaker	Business Narration	Custom
Fliki AI	Voiceovers and Voice Cloning	\$21-66/month
ElevenLabs's Voice Changer	Fun & Entertainment (Mobile)	Free-\$22/month
Speechify	Audiobooks	Free – \$139/month
Wavel AI	Podcasting & Voiceovers	\$18-60/month

*Note: systematized by the author*

Given that the technologies listed in the table are proprietary and require payment, audio content creation professionals might also want to test free technologies. Open-source technologies serve this need by offering tools anyone can use, modify, and distribute. These technologies are built on the principle of community collaboration, enabling continuous improvement and innovation while maintaining transparency and ethical standards in their development and application. Thus, open-source



platforms become invaluable resources for professionals who seek cost-effective, adaptable solutions for audio deepfake creation and manipulation.

The open-source technologies mentioned below focus on various audio and visual deepfake creation aspects. For example, Real-Time-Voice-Cloning specializes in cloning voices to produce speech from text, which is suitable for creating synthetic audio content. These tools offer innovative solutions for generating realistic audio and visual deepfakes, each with unique features catering to different needs within the deepfake creation spectrum (Kamunya, 2023).

Let's take a look at the list of open-source applications that are used to create audio deepfakes.

Table 3

### Top open-source applications used to create audio deepfakes (Kamunya, 2023)

Program 1	Description 2	Application Area 3
CorentinJ's Real-Time-Voice-Cloning	Real-Time-Voice-Cloning is written in Python and implements Transfer Learning from Speaker Verification to Multispeaker Text-To-Speech Synthesis (SV2TTS) deep learning framework for Windows and Linux. It creates a digital representation of a voice from a few seconds of audio in English, and then this representation is used as a reference to generate speech from text.	Able to cover voiceovers and synthetic audio content generation in projects where multilanguage support is not required
RVC-Boss's GPT-SoVITS	GPT-SoVITS is a voice conversion and text-to-speech framework written in Python that currently covers Japanese, Chinese, and English. It allows the launch of voice cloning model training with just one minute of audio data and supports further model training and fine-tuning, to improve voice similarity and realism.	Currently targets video game voiceovers and the development of virtual assistants providing customer support in English and Chinese
Wunjo AI	Wunjo AI is an advanced speech & deepfake neural network tool written in Python and JavaScript. It synthesizes and clones voices in English, Russian, and Chinese. This framework provides real-time speech recognition, as well as additional visual features like deepfake face and lips animation and deepfake face swaps.	Likely employed in synthetic audio creation for diverse multimedia uses
eSpeak NG	eSpeak NG is a compact speech synthesis engine written in C and Java for Windows, Linux, MacOS, and Android, supporting more than 100 languages and accents, therefore, catering to a diverse user base. The synthesized speech is clear even at high recording speeds but is not as natural or smooth as larger neural network synthesizers, which are based on human speech recordings.	Preferred for environments requiring worldwide language coverage that are not sensitive to slightly 'robotic' accents
MaryTTS	MARY Text-to-Speech is a text-to-speech synthesis framework written in Java and supporting a broad spectrum of languages, including English (UK and US), French, German, Italian, Swedish, Telugu, Turkish, and Russian.	Optimal for multiplatform implementations as this framework is written entirely in Java

Continuation of the Table 3

1	2	3
Festvox/flite	Known as Festival Lite or Flite, Carnegie Mellon University's Flite is a speech synthesis engine written in C. It covers only English but is recognized for its rapid text-to-speech conversion, positioning it as a preferred solution for applications running on embedded devices.	Optimal for computational resource-sensitive speech generation contexts, such as embedded devices, where multilanguage support is not critical
Coqui-ai's TTS	Coqui-ai's TTS is a deep learning toolkit written in Python that is highly rated by the GitHub community for supporting fast and efficient model training for voice cloning in 16 languages. It optionally includes Coqui-ai's Open-Speech-Corpora library that provides more than 20 thousand hours of recorded audio in multiple languages available for fine-tuning translations and improving synthesized voice realism.	Applicable in projects where voice cloning models may need extensive training on large audio datasets to fine-tune voice realism
Tortoise TTS	Tortoise TTS is a multi-voice text-to-speech system written in Python and trained with an emphasis on voice quality. It allows training voice cloning models in different languages, but it doesn't train its models fast, and it is called a 'tortoise' for that reason.	Favored in speech generation environments where high speed of model training is not critical
PaddleSpeech	PaddleSpeech is a voice synthesizer toolkit written in Python and C++, currently covering only English and Chinese. It provides a comprehensive suite of speech technologies, including speech recognition, text-to-speech, voice pattern extraction, and speech translation.	Applicable in advanced speech processing and translation projects for English and Chinese in environments that are not sensitive to slightly 'robotic' accents
BenAAndrew's Voice-Cloning	The Voice-Cloning framework is written in Python and JavaScript and allows training voice cloning models in different languages. It uses a reworked version of the Tacotron2 framework and, therefore, discloses that all copyrights belong to NVIDIA and follow the requirements of a BSD-3 license.	Favored in projects where voice cloning models may need extensive training in different languages to fine-tune voice similarity and realism

*Note: systematized by the author*

**Prospects for the development of audio deepfakes and their future.** The prospects for the development of audio deepfakes are enormous. They are mostly related to using artificial intelligence (Hays, 2023). Let's consider the future of these technologies.

1. Audio Watermarking as a Security Enhancement. Audio watermarking emerges as a promising application, transforming the narrative from combating deepfakes to embedding authenticity within genuine audio content. Companies like Resemble.ai and Microsoft are adopting audio watermarking in their text-to-speech (TTS) products to show how security measures can be seamlessly integrated into the technology. This not only aids in the clear differentiation between authentic and deepfake content but also upholds the integrity of digital audio communications, ensuring that genuine content remains verifiable and trustworthy.

2. **Benevolent Applications of Audio Deepfakes.** The benevolent applications of audio deepfakes are diverse, covering entertainment, education, personalized content creation, and even therapeutic uses. For instance, generating hyper-realistic audio content can enhance audiobooks, making them more engaging by using the voices of historical figures or fictional characters. In educational settings, audio deepfakes can facilitate immersive language learning experiences or simulate historical speeches for a more interactive learning environment. Moreover, in personalized media, audio deepfakes can tailor content to individual preferences, creating unique and engaging user experiences.

3. **Integration with Other AI Technologies.** Integrating audio deepfakes with other AI-driven technologies, such as video deepfakes and virtual reality, opens up new opportunities for multimedia content creation. This synergy can lead to more immersive and interactive experiences in virtual environments, gaming, and online platforms. The capability to create cohesive audio-visual deepfake content can transform storytelling, entertainment, and even social interactions in digital spaces, offering a richer, more engaging user experience.

4. **Advancements in Open-Source AI Technologies.** Open-source platforms serve as catalysts for rapid advancements in AI, including audio deepfakes. These platforms not only accelerate the development and refinement of deepfake technologies but also empower a diverse community of developers, researchers, and enthusiasts to contribute to the evolution of robust detection mechanisms, such as audio watermarking. This collaborative environment turns the potential challenge of deepfake detection into a continuous cycle of innovation, where each contribution enhances the system's resilience against misuse (Hays, 2023; Fauve, 2023).

In the contemporary landscape, where cutting-edge technologies emerge at an unprecedented pace, the domain of audio deepfakes, particularly those powered by artificial intelligence, has gained significant traction. Among the emerging open-source projects in this field, Wunjo AI (Habr, 2023) stands out as a notable example that encapsulates the potential and versatility of AI-driven audio and video deepfake creation.

Wunjo AI is accessible through its GitHub repository, where users can find the source code, documentation, and installation instructions for Linux, MacOS, and Windows. The project aims to foster a community of contributors to develop further and refine its capabilities. Wunjo AI represents a step forward in making deepfake technology and speech synthesis more accessible and customizable, inviting a broad audience to contribute to and benefit from the project's development.

The main functionality of this program includes:

**Text-to-Speech Synthesis.** Converts written text into realistic speech using advanced NLP techniques. Offers three voice models (female, male, and robotic) in English, Chinese, and Russian, with support for custom Tacotron 2 voice models and phoneme format for English.

**Deepfake Video Creation.** Transforms images into videos by applying facial expressions and gestures, allowing for dynamic character animations. An extension enables image generation for deepfake videos using Dall-e 2, provided the images clearly show eyes and mouth.

**Custom Extensions.** Users can enhance Wunjo AI's functionality by creating extensions for various purposes, such as console interaction, GPU usage, voice model training, and ChatGPT integration (Habr, 2023).

**Challenges and threats posed by audio deepfakes.** While voice cloning and audio deepfake technologies hold significant promise for a range of professional applications, from automated news reporting to personalized content creation, they are beset with challenges that span ethical considerations, computational demands, linguistic diversity, and the intricacies of human speech (Khanjani et al., 2023).

1. **Ethical Concerns and Misuse.** One of the most pressing concerns with TTS and audio deepfake technologies is their potential for misuse. Products like Lyrebird's Speechify and Descript have demonstrated the ability to generate highly realistic speech rapidly, raising concerns about creat-

ing fake personas or fabricating audio for malicious purposes, such as spreading misinformation or impersonating individuals to stir political or societal unrest.

2. **Computational Requirements.** Creating synthetic speech is resource-intensive, requiring significant processing power and data storage. Although advancements in software efficiency have mitigated this issue to some extent, the creation and refinement of high-quality speech synthesis still demand substantial computational resources.

3. **Dependence on Speech Corpus Quality.** The quality of a TTS system is heavily reliant on the speech corpus from which it learns. Creating a comprehensive and high-quality speech corpus is not only expensive but also challenging, especially for languages or dialects with limited available data. Updating or modifying an existing speech corpus can be complex and resource-intensive.

4. **Language and Dialect Limitations.** TTS technologies face difficulties in accommodating sparsely spoken languages, particularly those without a standardized writing system. Additionally, the lack of linguistic components readily available for all languages poses a challenge for creating universally effective speech synthesizers. This limitation extends to accurately modeling dialect variations and accents, which is essential for producing speech that reflects genuine human language diversity.

5. **Prosodic Challenges.** Prosody, encompassing speech's rhythm, stress, and intonation, is crucial for the authenticity and intelligibility of synthesized speech. However, many TTS systems need help to implement prosodic features effectively, resulting in speech that can lack the nuanced emotional and phonetic qualities of natural human speech. The inability to accurately mimic human prosody can lead to synthesized speech that sounds unnatural or robotic.

6. **Homographs and Special Characters.** TTS systems often struggle with homographs—words spelled the same but with different meanings—leading to incorrect pronunciations in context. Furthermore, recognizing periods, special characters, and the nuances of human speech elements like breathing, laughter, and pauses remains challenging, deviating from synthesized speech's human-like quality (Khanjani et al., 2023).

The realm of deepfake detection in audio recordings grapples with formidable challenges, as the technology behind deepfake generation continues to evolve and become more sophisticated. At the forefront of this battle are advanced deep learning models and innovative datasets designed to train these models to discern the subtle discrepancies that differentiate genuine human speech from its artificially generated counterparts. Among the notable endeavors to enhance deepfake detection capabilities are extensive datasets like DFDC, DeeperForensics-1.0, and Celeb-DF, each offering a wealth of data aimed at capturing a broad spectrum of human speech characteristics across different genders, ages, and ethnicities. These datasets are instrumental in training detection algorithms to recognize and flag inconsistencies and anomalies in audio samples that may suggest manipulation. However, despite these advancements, the detection of audio deepfakes remains fraught with difficulties. The technology's capacity to generate increasingly convincing fake audio poses a persistent challenge, necessitating ongoing research and development to refine detection methods and ensure they remain effective against an ever-evolving threat landscape (Naitali et al., 2023).

**Conclusions.** Audio deepfakes represent a significant technological advancement in the creation and manipulation of audio recordings to mimic individual voices convincingly. The three primary categories of audio forgeries – imitation-based, synthetic-based, and voice cloning – each serves different purposes and presents unique challenges. While these technologies offer innovative applications in entertainment, customer service, and security testing, they also raise ethical and security concerns, necessitating careful consideration and regulation to mitigate potential misuse.

The landscape of audio deepfake creation is populated by a diverse array of software solutions, each tailored to specific needs and applications. Notable programs include Resemble.ai for entertainment, Descript for podcasting and audio editing, CereProc for multilingual voice cloning, Respeecher for filmmaking and gaming, iSpeech for customer service and gaming applications, ReadSpeaker.ai



for business narration, Replica Studios for video games and voiceover projects, and Voice Changer for fun and entertainment in mobile applications. These tools, alongside open-source technologies like Wunjo AI, eSpeak NG, and CorentinJ's Real-Time-Voice-Cloning, provide a comprehensive toolkit for professionals and enthusiasts to explore the creative and functional potentials of audio deepfakes, with a strong emphasis on ethical use and innovation. The future of audio deepfakes presents both exciting opportunities and significant challenges. The technology holds great promise for innovation in storytelling, personalized content, and educational tools, supported by advancements in AI and open-source platforms like Wunjo AI. However, ethical concerns, computational demands, and linguistic diversity pose considerable challenges. The potential for misuse in spreading misinformation and the technical complexities involved in creating realistic and diverse linguistic content highlights the need for ethical guidelines and robust detection mechanisms. Balancing the benefits against the risks will be the key topic in the development and application of audio deepfakes in the next several years.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-12>

## THE MOTIVATION POTENTIAL OF THE FORMATION OF THE INNOVATION-ORIENTED PERSONALITY OF THE FUTURE TEACHER OF PHYSICAL EDUCATION

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**Abstract.** The purpose of the article is to study the essence of the motivational potential in the process of forming an innovation-oriented personality of the future teacher of physical education. As a result of the analysis of scientific and pedagogical literature, we determined that motivational potential is one of the essential characteristics of a teacher, contributes to success in his professional activity and self-improvement, social security in today's conditions and competitiveness in the labor market. Having determined what forces a teacher to act, what motives are at the basis of his professional activity, it is possible to develop an effective system of forming the teacher's motivational competence. The purpose of forming the motivational potential of the future physical education teacher is to be able to push him to work better, to take responsibility for his duties, to make maximum efforts to perform professional tasks. Under the motivational potential of the formation of innovative competence of the future physical education teacher, we understand such a set of factors that effectively influence the formation and development of all components of the professional activity of the future specialist.

**Key words:** motivation, physical education, personality, innovativeness, innovation direction, professional training, professional education, motivational potential.

**Introduction.** Today, educational standards are updated, new strategies for the development and improvement of the teaching profession are introduced. In this regard, the emphasis in the learning process changes, it becomes important not only to master knowledge and "hard" skills, but the development of personal qualities and the formation of relevant personal traits in a student of higher education is extremely relevant (Dmitriieva, 2022). To implement this task, it becomes necessary to train a specialist of a new era, with the ability to see and implement innovations in professional activity in general and with modern children in particular. A physical education teacher must be a person open to new ideas, constantly improve his professional skills and be completely focused on the needs of students, interacting with whom he conducts professional activities (Dmitriieva, 2023). Therefore, the task of personality formation in general and innovation-oriented personality in particular arises.

A significant role in revealing a student's creative abilities and transforming them into creative activity is played by his motives and will. Therefore, the educational activity of the higher school should be aimed at forming and enriching the motives of the creative professional activity of the future specialist. It defines certain ratios of dynamic and substantive aspects of activity and behavior. Productivity of activity is determined: first, by the direction of motives, their content; secondly, by the degree of activity, intensity of the motives of the corresponding content; which in general constitutes the originality of the motivation of the student's personality. According to psychologists' studies, the motivational sphere is more dynamic than cognitive and intellectual. Relative dynamism has positive and negative sides. If it is not managed, then there may be a regression of motivation, a decrease in its level and, in general, the effectiveness of the individual may be lost. It is clear that at the student age, the formation of motivation should become the subject of purposeful systematic work.

**Main part.** The purpose of the article is to study the essence of motivational potential in the process of forming an innovation-oriented personality of a future physical education teacher.

Motivation of the future teacher of physical education in the process of professional training to acquire skills and innovative professional activity.

We consider innovative competence as the readiness of the subject of pedagogical activity, expressed in the ability of an individual to create and apply in educational practice the products of innovative activity, to use the process of obtaining, implementing and distributing them as a mechanism for self-development, personal and professional growth, which is expressed in the individual's awareness of his work as values revealed in the implementation of innovative skills and personal experience at the level of practice-oriented knowledge. Innovative competence provides the subject of activity with content-technological readiness for the implementation and development of one's own innovative potential, allows to become more successful in professional and pedagogical activities, to be satisfied with its results, to successfully realize oneself, to realize one's personal and professional potential, to become ready to participate in competitive relations

Note that innovative competence reflects the system level of formation of innovative knowledge, skills, competencies and experience of innovative activity, the ability to create, create a new product, introduce new technologies and methods into the learning process, acting as a measure of readiness to use one's innovative potential to achieve innovative goals as effectively as possible professional activity.

Based on the comparison of the results of the theoretical foundations of the researched problem, we propose to understand innovative orientation as a personal and psychological formation that enables the specialist's ability to carry out innovative activities and implement innovative ideas. In the process of formation of the innovative orientation of the individual, we identified three successive stages:

- pre-dispositional: manifests itself in the behavioral sphere as a prerequisite for self-development;
- dispositional: denotes the transition of opportunities (as a resource) into the procedural plan, when they are revealed as a relationship, readiness, intention, reflecting the filling of goals and content, which allow resources to declare themselves in simulated situations;
- processual-dynamic: the transformation of the resource component (opportunities) into potentials is fixed – the forces that trigger their implementation, which causes a person to go beyond the limits of the existing experience, the launch of self-development mechanisms. At the same time, actually emerging operational meanings and values, associated with them, are analyzed, the quality of which communication can be judged on the basis of specific behavioral acts formed in potentially innovative situations.

We expressed the innovation-oriented personality of the future teacher of physical education, which is considered by us, in the form of the phenomenon of innovativeness, which involves not only obtaining in the course of productive pedagogical activity in the scientific and educational environment of a higher education institution a scientific and practical result – a final innovative educational product that possesses new qualities, but also its ability to be widely distributed and used in educational practice. We consider the innovation-oriented personality of the future physical education teacher as a set of personal properties, qualities and abilities that ensure her psychological readiness to generate new forms of activity for the creation, mastering and distribution of innovative educational products, as well as self-development and personal growth as a strategic factor of productive pedagogical activity.

The formation of the innovation-oriented personality of the future physical education teacher is a set of personal properties, qualities and abilities that ensure her psychological readiness to generate new forms of activity for the creation, mastering and distribution of innovative educational products, as well as self-development and personal growth as a strategic factor of productive pedagogical activ-

ity. The phenomenon of innovativeness acts as a means of generating new forms of activity with the aim of obtaining an innovative educational result capable of practical use.

Let's move on to consider the problem of structuring the innovation-oriented personality of the future physical education teacher as a subject in innovative pedagogical and scientific-pedagogical activities. Solving this task, we turned to studies that highlight the core personal components in the logical and essential construct of the innovative potential of the individual (Dmitrieva, 2022).

We consider the phenomenon of innovativeness as the readiness of the subject of activity (teacher, young scientist, student), expressed in the ability of an individual to create and apply in educational practice the products of innovative activity, to use the process of obtaining, implementing and distributing them as a mechanism for self-development, personal and professional growth, which is expressed in the individual's awareness of his professional activity as a value, which is revealed in the implementation of innovative skills and personal experience at the level of practice-oriented knowledge. On the basis of this, we state that the phenomenon of innovativeness in the structure of the innovation-oriented personality of the future physical education teacher requires knowledge of the theory of productive pedagogical activity, pedagogical innovation, innovative activity in continuous education; professional knowledge and ideas about directions of educational development, the ability to carry out the process of designing, developing and presenting innovative educational products (programs, methods, projects), self-organization and cooperation skills.

The successful formation of an innovation-oriented personality of the future physical education teacher is largely determined by her creative potential. Therefore, we highlight the phenomenon of innovativeness as a structural component of innovative potential. Novelty and transformation as essential features of innovativeness are the main features of creativity (Dmitrieva, 2023).

The disclosure of the mission of the physical education teacher, creativity in pedagogical activity, as well as the phenomenon of innovation comes first.

The main mission of the physical education teacher is determined by his functions as a subject of activity, the structural hierarchy of practical, praxeological and mental pedagogical activities of the teacher in the unity of their interconnected manifestation. So, we can talk about the systemic and level nature of pedagogical activity, the structure of which is determined by external subject, praxeological and pedagogical mental activity. The implementation of these forms of activity is based on one general idea – the development of activity and independence of the children themselves, the development of their activities. Regulating children's activities, the physical education teacher uses a variety of ways to influence students, related to the creation in the process of education and upbringing of such conditions that contributed to the organization of the independence of the children themselves. At the same time, the teacher's choice of pedagogical tools should be based on the diagnosis and forecast of the pedagogical situation. Only after delving into the essence of pedagogical phenomena, understanding the regularities of the pedagogical process, in which the main goal is the development of the student's personality, correctly assessing one's pedagogical potential, one can choose the necessary methods for students, determine pedagogical tools and apply them. Therefore, practical pedagogical activity is always accompanied by praxeological and intellectual pedagogical activity.

Innovative orientation is an important characteristic of a modern personality and is a personal resource that can be actualized and put into action to achieve the desired result under optimal conditions for the development of personal abilities, as well as the ability of the individual in the field of setting and solving the tasks of his activity. Such a personal resource contributes to the elimination of contradictions between the individual and the living environment, overcoming adverse external circumstances with the help of the transformation of the value-meaning subsystem of the individual, which sets the vector of its orientation, the basis of self-realization through creative activity in the professional sphere (Dmitrieva, 2023).



The general structure of the innovation-oriented personality of the future physical education teacher is considered taking into account the regularities of the functioning of the motivational, emotional and volitional spheres, cognitive processes (divergence of thinking, degree of rigidity of mental processes, etc.), individual characteristics (ability to creativity, internality in decision-making) of the subject activity.

The innovation-oriented personality of the future teacher of physical education is an integral quality of a person, which is formed as a result of his inclusion in innovative activity and consists of interconnected and mutually determining components: orientational, cognitive, active, reflective (Dmitriieva, 2023).

The orientation component of the innovation-oriented personality of the physical education teacher is the core around which the main properties and qualities of the teacher's personality as a professional are constructed. This is explained by the fact that the innovative orientation component performs a regulatory function in the process of teacher preparation for innovative activities. We believe that the innovation-orientation component of the innovation-oriented personality of a physical education teacher is a content-forming component, as it is aimed at forming a future teacher's constant desire for development and improvement of his innovative activity. Orientation to innovative activity includes everything that prompts actual activity, generalized and more specific life goals for which a person acts. A motive is a verbalization of a goal and a program that enables this person to initiate a certain activity. A motive can also be understood as a desired target state within the framework of the "individual – environment" relationship, and motivation as something that explains the purposefulness of an action. The problem of motivational readiness, receptiveness to pedagogical innovations is one of the central ones in teacher training, since only motivation adequate to the goals of innovative activity ensures harmonious implementation of this activity and self-disclosure of the teacher's personality. The innovation-oriented component of the innovation-oriented personality of the physical education teacher must be considered in two directions. Firstly, from the point of view of the place of professional motivation in the general structure of motives and, secondly, by assessing the future teacher's attitude to changes, that is, in the needs for pedagogical innovations, their receptivity, which determines the meaningful side of the creative direction of professional activity. The formation of the innovation-oriented personality of the future physical education teacher is largely determined by the public environment, the collective of teachers – the pedagogical community. The personality of each teacher is unique, as well as determines the degree of receptivity to pedagogical innovations, the nature and peculiarities of the author's concept, the level of its implementation and others.

The cognitive component of the innovation-oriented personality of a physical education teacher is aimed at enriching future physical education teachers with psychological and pedagogical knowledge and information about the essence of innovative activity in the direction of physical education, its structural components, signs and features.

The active component of the innovation-oriented personality of the future physical education teacher is an important guarantee of the implementation of innovative activities, as mentioned above, which is necessary for the creation of a new program, as well as for the modification of this new one at the level of implementation. Therefore, pedagogical creativity is a necessary component, a key to the formation of the ability to use a certain amount of specific knowledge, skills necessary for the effective implementation of creative pedagogical activity by a physical education teacher.

The reflective component of the innovation-oriented personality of the future physical education teacher as a system-forming component of professional activity in the pedagogical sphere, as an integrative quality of the personality provides stable professional motives, motivational focus on the implementation of reflection in professional activity, systematic knowledge about reflection itself, its place in the socio-pedagogical sphere, which allows to effectively and adequately implement it, to creatively understand and overcome problematic moments, to forecast situations. It is this quality of

the personality of the future physical education teacher as a professional that contributes to self-development and the ability to develop reflection in others (Dmitriieva, 2023).

The innovation-oriented personality of the future physical education teacher also includes the following personal qualities: tolerance for uncertainty, the ability to take justified risks, responsibility, the need for self-realization, achievement motivation, reflexivity, creativity (quality of intellect, intellectual initiative).

We came to the conclusion that the formation of an innovation-oriented personality of a future physical education teacher is a holistic dynamic process of influencing the development of innovation-oriented, cognitive, praxeological, reflective components of education, which enables the individual to internalize innovative pedagogical ideas with their further application in practice. This process is a component of the formation of the professional competence of the future teacher of physical education and is realized through creativity, which represents a creative understanding of the task and acts as a basis for innovation (Dmitriieva, 2023).

To create an innovative product, it is necessary to apply creative thinking, a non-standard approach, find a new quality in an existing product, the ability to be creative, which is aimed at the fulfillment of a specific scientific and practical goal, which involves obtaining a certain effect, and the creative potential of an individual is the basis for the formation of an innovation-oriented personality of the future teacher of physical education, the value of the personality, which must be developed, taking into account the requirements of modernity, and therefore the effectiveness of the formation of the innovation-oriented personality of the future teacher of physical education in the scientific and educational environment (Dmitriieva, 2023).

The theoretical analysis of the literature made it possible to determine the meaning of the concept of "motivation" as a type of managerial activity that ensures the process of encouraging a person to be effective, aimed at achieving personal goals or goals of the organization (Dubaseniuk, 2017).

Motivation in didactics is the process of formation and consolidation of positive learning motives. Motivation not only determines the student's educational activity, but also permeates the cognitive sphere of his mental activity with all its cognitive processes: perception, thinking, imagination and memory (Ovsianetska, 2007).

The concept of "motivation" is interpreted as "a set of motivational factors that determine the activity of an individual; these are all motives, needs, incentives, situational factors that encourage human behavior" (Zaniuk, 2002).

There are three regulatory functions performed by motivation in relation to activity: motivational, i.e. providing the activity with a motor impulse or motive for the individual to start the activity; meaning-making, i.e. providing activities with deep personal significance; organizational – one based on goal setting, when perceived motives are transformed into motives-goals (Liashenko, 2023). Motivation (moveo – I move) is considered as the implementation of a motive in a specific activity in the process of choosing possible actions aimed at achieving certain goals. Motive is a drive or desire to achieve a goal and awareness of action to achieve it.

We understand positive motivation for educational and cognitive activity as a dynamic phenomenon, as a process of formation of such learning motives in students of higher education, which prompt them to productive cognitive activity and mastering the content of professional training, as well as maintenance and implementation of already existing positive motives for professional training.

Therefore, educational motivation is the result of the student's need for cognitive activity and his readiness to master the components of the educational and professional program. Actually, professional training has a smaller effect on the enrichment and development of motivation. In this regard, it is necessary to dwell in more detail on the analysis of educational motivations.

Under educational motivation, it is proposed to understand such a subjective need that can be satisfied with the help of additional professional education, advanced training, etc., that is, those types

of training that can be part of the corporate education system. Their specificity lies in the fact that the source of their formation can be bilateral. Educational needs can arise both from the subject of professional activity (directly a professional), who feels a low level of his own competence in something, and from the organization in which he performs professional activity (Stepaniuk, 2018).

Professional motivation can be defined as the action of specific incentives that determine the choice of a profession and the long-term performance of duties related to this profession, or a set of internal and external forces that push a person to work and give this activity a direction oriented towards achievement certain goals. According to scientists, professional motivation as a personality trait is a system of goals and needs that prompt a student to actively acquire knowledge, master skills and abilities, and consciously relate to the profession (Shevchenko & Dzhoan, 2017).

The structural components of professional motivation are initiation motivation (encourages activity); selection motivation (contributes to goal selection); implementation motivation (ensures regulation, control of the implementation of the corresponding action); post-realization motivation (makes it possible to complete an action and encourage another) (Yerokhin, Nikitin & Nikitina, 2011).

The motivation of innovative behavior is a set of needs and motives that encourage an employee either to innovative activities for the creation and introduction of new products, technologies, services or, on the contrary, to their purchase and use in their activities and everyday life. Therefore, the motivation for innovations can be considered dually: as motivation for their creation and implementation and motivation for using innovations (Martynenko, 2011).

Motivation to innovate can be defined as a set of methods and motives that encourage personnel to actively engage in creative activities aimed at creating innovative goods and services, forms of their use, and the introduction of new technologies to ensure an increase in the level of competitiveness and product quality (Khlup'ianets, 2020).

Let's consider innovative professional and pedagogical activity, which is characterized by productive creative activity, the solution of non-standard professional problems, a high level of development of professional competences. The innovative activity of the future physical education teacher is manifested in the degree of intellectual initiative, in the development of creative activity, in the transition to personally oriented learning, in the use of educational situations related to the professional activities of future specialists. The concepts of "motivation" and "potential" should be distinguished. Thus, in the dictionary of foreign words, it is stated that potential is opportunities, available forces, reserves, means that can be used.

In the large explanatory dictionary of the modern Ukrainian language, the concept of "potential" is presented as a set of all available means, opportunities, productive forces, etc., which can be used in any field, area, sphere; stock of something, reserve; hidden abilities, forces for any activity, which may appear under certain conditions (Velykyi tлумachnyi slovnyk suchasnoi ukrainskoi movy, 2005).

The concept of "potential" as a psychological phenomenon integrally describes the phenomena of motives and abilities. The abilities of the individual are reflected as already realized potential, and the motivation of the individual – as further prospects for the development of potential, that is, unrealized potential (Liashenko, 2022). The potential of the individual is a systematic and hierarchical formation.

In the acmeological sense, potential is considered not only as naturally determined (abilities, naturally determined professionally important qualities, positive hereditary factors), but replenished resources (intellectual, psychological, volitional, and others), but replenished or restored not "automatically", but arbitrarily, i.e. directed by the individual himself in accordance with the chosen goals, in particular, focused on progressive personal and professional development.

There is also the concept of educational potential, which is considered from three positions. First, it concerns the model of activity implemented in the school. Secondly, the potential for development is related to the choice of a functional or developmental type of management. Thirdly, the development potential is related to the expressiveness of teachers' desire for self-educational work.

Let's analyze the concept of "professional potential".

According to the resource-based approach to determining the potential, the professional potential of a specialist is understood as a renewable self-managed system of his internal resources, which are manifested in professional achievements. The key quality of professional potential is its systematicity. Therefore, the potential covers not only the set of resources, but also the system of their management, which has conscious and unconscious levels.

Professional potential as a set of all available means, opportunities, resources, hidden abilities first develops, accumulates, and later is realized in professional activity. Separate issues of the formation of positive motivation for the professional pedagogical activity of specialists are highlighted in the works of Ukrainian teachers.

The general problems of motivation are studied within the framework of different paradigmatic approaches of psychology, in particular, highlighting the motivational factors of a teacher's professional development.

An important role in the aspect of formation of innovative competence is played by motivational potential. The motivational potential is understood as the strength of the influence that this stimulus has on the energy of the motive. External stimuli can strengthen or weaken the power of the motive.

As a result of the analysis of scientific and pedagogical literature, we determined that motivational potential is one of the essential characteristics of a teacher, contributes to success in his professional activity and self-improvement, social security in today's conditions and competitiveness in the labor market. Having determined what forces a teacher to act, what motives are at the basis of his professional activity, it is possible to develop an effective system of forming the teacher's motivational competence.

The purpose of forming the motivational potential of the future physical education teacher is to be able to push him to work better, to take responsibility for his duties, to make maximum efforts to perform professional tasks.

Based on the considered concepts, a proper interpretation of the motivation of the future physical education teacher in the process of professional training to acquire the skills and abilities of innovative professional activity is formulated – this is a process, the result of which is the construction of the student's educational activity taking into account the needs, interests, and capabilities of the individual in relation to effective future professional activity .

Under the motivational potential of the formation of innovative competence of the future physical education teacher, we understand such a set of factors that effectively influence the formation and development of all components of the professional activity of the future specialist.

**Conclusion.** On the basis of the conducted research, we came to the conclusion that the motivation of the future teacher of physical education in the process of professional training to acquire the skills and abilities of innovative professional activity is a process, the result of which is the construction of the educational activity of the student taking into account the needs, interests, and capabilities of the individual regarding effective future professional activity. The general structure of the innovation-oriented personality of the future physical education teacher is considered taking into account the regularities of the functioning of the motivational, emotional and volitional spheres, cognitive processes (divergence of thinking, degree of rigidity of mental processes, etc.), individual characteristics (ability to creativity, internality in decision-making) of the subject activity. The innovation-oriented personality of the future teacher of physical education is an integral quality of a person, which is formed as a result of his inclusion in innovative activity and consists of interconnected and mutually determining components: orientational, cognitive, active, reflective. The formation of an innovation-oriented personality of the future physical education teacher is a holistic dynamic process of influencing the development of innovation-oriented, cognitive, praxeological, reflective components of education, which enables the individual to internalize innovative pedagogical ideas with



their further application in practice. This process is a component of the formation of the professional competence of the future teacher of physical education and is realized through creativity, which represents a creative understanding of the task and acts as a basis for innovation. To create an innovative product, it is necessary to apply creative thinking, a non-standard approach, find a new quality in an existing product, the ability to be creative, which is aimed at the fulfillment of a specific scientific and practical goal, which involves obtaining a certain effect, and the creative potential of an individual is the basis for the formation of an innovation-oriented personality of the future teacher of physical education, the value of the personality, which must be developed, taking into account the requirements of modernity, and therefore the effectiveness of the formation of the innovation-oriented personality of the future teacher of physical education in the scientific and educational environment. Under the motivational potential of the formation of innovative competence of the future physical education teacher, we understand such a set of factors that effectively influence the formation and development of all components of the professional activity of the future specialist.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-13>

## MEDICAL STUDY OF SPEECH DISORDERS

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**Abstract.** Speech is one of the most important mental functions of a person. Speech communication not only creates social relations between people, but also develops higher forms of cognitive activity. Speech and thinking are inextricably linked. Speech is also a very complex phenomenon and is a set of several processes. Almost all systems of the body: muscles, bones, various and numerous organs, especially the central nervous system, take an active part in its formation. More serious damage to the muscles occurs as a result of damage to the parts of the peripheral parts of the nervous system that supply the muscles of the face, tongue, thorax with nerve seeds. Disruption of this causes severe speech disorders such as dysarthria and anarthria. In the study of speech disorders, it is necessary to consider the role of neural mechanisms that perform the activity and help to plan the activity.

**Key words:** speech activity, speech disorders, speech therapy, dysarthria, nervous system.

**Introduction.** Disruption of speech to one degree or another causes certain difficulties in both mental and psychological development of the child. Most of the time, gross speech disorders manifested in children appear due to anatomical and physiological deficiencies of the speech apparatus. One such defect is congenital cleft lip and palate. Congenital clefts of the lip and palate not only create a deformed appearance of the child, but also hinder its normal development and cause severe speech disorders.

**Formulation of the problem.** It is known that speech therapy is closely related to neurophysiology, neuropsychology and clinical neurology fields of medical science. Thus, the speech defects studied by speech therapy appear against the background of one or another disorders of the nervous system, which is the substrate material of thinking, consciousness and speech. Failure to study the condition of the nervous system, on the one hand, makes it difficult for the speech therapist to understand the nature of neurological disorders, their impact on the formation and development of speech, and on the other hand, its neglect makes it difficult to eliminate various speech defects.

**Research objectives.** The close cooperation of doctors and speech therapists in the elimination of speech defects laid the foundation for the clinical classification of speech anomalies. Creators of the clinical classification, M.Y. Khvatset, F.A. Rau, O.V. Pravdina, S.S. Lyapidevskiy and others classified speech defects based on the causes of the defect (etiology) and pathological indicators (pathogenesis). (Koichi, 2011, p.248-253) Researchers have different ideas about the role played by separate areas of the brain in speech disorders, some scientists (Broca, Wernicke) put forward the idea that speech disorders are localized only in one part of the brain, while others (P. Pavlov, B.M. Gekht) criticized these ideas. B. M. Gekht showed that the indicated areas of the brain are the places where numerous connections between speech activity and its various areas take place, and therefore their damage leads to gross speech defects (Koichi, 2011, p. 249)

**Discussion.** Speech is a social tool in child education. The main conditions for proper speech development in a child are as follows:

a) being the basis for receiving information, that is, the presence of acoustic, visual and synesthetic receptors;

b) to analyze received information and to have a well-developed substrate for health, that is, to have a sufficient level of intelligence and a certain morphological and functional development of memory – nervous system;

c) the presence of a motor apparatus that is important for articulation.

It is clear that the above conditions can be ensured only during the normal development of the entire brain and individual parts of the nervous system. However, available clinical materials and experiments in neurophysiology show that damage to some parts of the brain causes more pronounced speech defects, while damage to other areas does not cause any speech defects. Everyone knows well that damage to the occipital, occipital, and frontal parts of the head causes certain speech defects. Researchers have different ideas about the role played by separate areas of the brain in speech disorders, some scientists (Broca, Wernicke) put forward the idea that speech disorders are localized only in one part of the brain, while others (P. Pavlov, B.M. Gekht) criticized these ideas (Koichi, 2011, p. 249).

Thus, the localization of the speech disorder symptom should not be confused with the localization of the substrate (responsible for the formation of speech activity and activity). All this also applies to the organization of movement activity, which creates a coordinated activity of the articulation muscles (Aghayeva & Aliyeva, 1999, p. 101).

The large hemispheres are divided into forehead, occipital, occipital, and occipital regions, and each region has different wrinkles and symptoms. Symptoms of damage to the cortex of the cerebral hemispheres depend on which part of it is damaged. Speech disorders most often occur when the third frontal folds of the posterior parts of the dominant hemispheres (motor aphasia, motor alalia), folds of the upper occipital lobe (sensory aphasia, sensory alalia), the occipital lobe and the occipital lobe are damaged. Damage to the extracorporeal folds of the left hemisphere leads to the breakdown of complex movement habits. This condition is called apraxia in speech therapy. In apraxia, automatic movements are forgotten. For example: in the case of apraxia of the tongue, the patient cannot put his/her tongue in his/her mouth, in addition, the upper and lower movements of the tongue are limited, as a result, the speech activity is impaired (Huseynova & Rustamova, 2007, p. 3, 45).

Subcortical nodes together with other members of the nervous system form the extrapyramidal system. The main task of this system is its correction in the process of preparing and performing an act of action.

The extrapyramidal system is closely connected with the sensory derivatives of the visual glomeruli, and is involved in the implementation of emotional-motor reactions (for example, facial movements). The extrapyramidal system is involved in the change of muscle tone. It changes the location of the center of gravity, relieves certain muscles from work, changes the tonic tension of the antagonistic muscles in the process of movement. Violation of this system leads to gross defects of muscle activity: involuntary, violent movements – hyperkinesia.

It should be noted that the defects of speech activity caused by damage to the extrapyramidal system are very characteristic and diverse. For example: the presence of hyperkinesia in the articulatory muscle distorts the speech and makes it unintelligible. During athetosis, the involuntary opening of the mouth and completely sticking out the tongue deprives the child of speech.

During chorea, speech disorders take on a different character. Thus, as a result of periodic violent movements of the diaphragm and intercortical muscles, regular breathing occurs, which in turn disrupts the smoothness of speech, and involuntary screams and moans are observed during speech (Huseynova, 2014, p. 37). Analogous spasms are manifested in the muscles of the larynx and the tongue and cause distorted pronunciation of sounds.

The brain and brain stem also play a big role in the creation and development of speech. In the brain stem, there are nuclei and transmitters that connect a large number of brain parts and connect it to the spinal cord. The groups of cells in the brain stem form the beginnings of the cranial nerves,



which carry out movement and sensory activity in relation to the various branches of the head. The cranial nerves are: optic nerve, trigeminal, trigeminal, indirect, facial, azan, glossopharyngeal, sublingual, accessory and vestibular nerves. The role of these nerves in the occurrence of speech defects is determined depending on the importance of their internal control, especially the movement of articulation muscles (Ingram, 1972, p. 405. Ex: the trigeminal nerve supplies the muscles of mastication with nerve and nerve tissue. As a result of damage to this nerve, the lower jaw droops and the inability to close the mouth makes proper articulation even more difficult. The facial nerve innervates most of the facial muscles of the corresponding side of the face. When this function is impaired, the patient is unable to close his/her eyes, raise eyebrows, inflate cheeks and pipe lips. The motor part of the tongue-lip nerve innervates the soft palate and the upper part of the pharynx. Damage to the nerve causes paralysis of those muscles. Azan nerve innervates all organs of the chest and abdominal cavity, muscles of the larynx, pharynx and palate (Ingram, 1972, p. 406). The sublingual nerve innervates the muscles of the tongue, making it move upwards, forwards and sideways. As a result of damage to all the above-mentioned nerves, the movement of the articulation apparatus and the process of sounding are disturbed. That is why it is necessary to pay attention to the issues of speech disorders related to nervous system disorders.

It should be noted that a certain number of children suffering from a speech disorder have one or another disease of the nervous system. Nervous system diseases are divided into two parts, organ and functional. Organic diseases occur during more or less structural changes in the tissues of the nervous system. Functional nerve diseases are based on neurodynamic disorders.

According to their origin, the **diseases of the nervous system** are divided into infectious diseases, nervous system damage, hereditary-degenerative diseases, metabolic diseases, tumors and vascular diseases of the brain. Speech disorders in children often occur as a result of infectious diseases, traumas of the nervous system, intoxication and hereditary-degenerative diseases. Infectious diseases infect children through bacteria (bacteria, germs, infection) or viruses. Neuroinfectious diseases include meningitis, encephalitis, meningoencephalitis, poliomyelitis, polyradiculo-neuritis and others. The most severe and frequently observed injuries are head injuries. These injuries occur in the womb of the child and during childbirth (birth trauma, extraction of the child with forceps, etc.). Nervous system injuries are one of the main causes of speech disorders in children.

**Functional disorders** of the nervous system are not of structural origin. In modern neuro-physiology, neurotic disorders are mostly associated with extinction of nerve impulses. There are 2 dominant factors in the etiology of neurotic disorders: exogenous and endogenous factors. Neurotic disorders are more likely to occur as a result of a combination of these two factors (Lewis, Watterson & Houghton 2003, p. 50).

It should be noted that often neuroses are observed in children whose families already have mental patients. There are 3 main types of neuroses: neurasthenia, hysteria, psychosthenia. It should be noted that the true form of these types is not observed in children. However, a detailed examination of children with neurosis shows that these children may have symptoms similar to various forms of neurosis developed in adults. For example, the dominant place in the clinical picture of some children is early fatigue, light-headedness, sadness (weakness) of active attention, sleep disturbance, and lack of memory. These symptoms are similar to symptoms of neurasthenia. In other children, excitability, meticulousness, lack of self-confidence, doubts about their own actions are observed. Such children also have cowardice, excessive crying (psychosthenic form of neurosis). In hysterical type neuroses, emotional behavior, self-incitement, psychological incitement, etc. are manifested.

Sometimes hysterical mutism (rejection of speech, silence due to the absence of changes in any part of the nervous system) is observed in such patients. Although patients with mutism do not speak, their writing habits are intact. Sometimes hysterical aphonia (absence of voice) is also observed in patients with hysterical type (Sadiyev, 2006, p. 200). Seizures sometimes occur in hysterical type

patients under the influence of a psycho-damaging factor. Seizures are characterized by an abundance of directional movements (laughing, crying, gnashing of teeth).

Usually, at this time, the patient's understanding is not impaired, reflexes and sensitivity are preserved. Using these, hysterical fits can sometimes be prevented by strong emotional influence or unusual irritation. Spraying cold water on the patient's face is accompanied by dysfunctions – excessive sweating, fluctuations in arterial pressure, pulse variability. In some cases, the dysfunction manifests itself in the violation of the activity of any organ: heart, gastrointestinal tract, etc.

It should be noted that the motor characteristics of children with neurosis also attract attention. Thus, high motility, restlessness, rapid execution of separate acts of movement are noted in patients. Sometimes this is accompanied by fatigue. One of the formations of neurosis is coordinator neurosis, which is a violation of the coordination of actions, the habits of performing a certain type of activity (writing, playing the piano, etc.). At this time, other types of activity usually remain unchanged. So, a patient who cannot write with a pen can play the piano or vice versa. A special type of neurosis is stuttering. Usually, in a very large number of children who stutter, this disease occurs against the background of a developing neurosis, and only in a very few children stuttering can occur simultaneously with other types of neurosis. Children who stutter are usually hyperactive. The actions of these children are sharp, often insufficiently coordinated, irritable.

In such children, lack of attention, lack of memory, and other mental disorders are noted. The dynamics of the indicated symptoms are the same as the dynamics of speech impairment. During the reduction of stuttering, other autonomic, somatic and emotional neurotic processes are also reduced and, conversely, causes the increase of symptoms indicating the increase of stuttering (Ingram, 1972, p. 408). Treatment of neurological disorders causing speech defects is very important for the normalization of speech activity. It goes without saying that this treatment should be carried out under the appointment and supervision of a specialist, a psycho-neurologist.

The following measures are used in the treatment of neurological disorders.

a) to affect the main processes that cause the malfunction or damage of the nervous system (etiological treatment);

b) influencing the mechanism of development of the disease process (pathogenic treatment);

c) affecting individual symptoms of the disease (symptomatic treatment).

In the etiological treatment, which is the least common in speech therapy activity, even if children have been treated before, in the speech therapy work process, they still undergo a certain course of treatment against bacteria, against chronic nervous system diseases, and for the restoration of metabolism. Pathogenetic therapy of diseases of the nervous system that cause speech disorders is used more often. The main goal of this treatment is to limit the activity of the mechanisms that lead to the development of pathological processes and to create positive opportunities for the restoration of damaged functions. Diseases of the nervous system that cause the development of pathological processes, mainly disorders of liquor dynamics, infectious inflammatory diseases and injuries. In this regard, in order to prevent the effects of the mentioned factors on the nervous system, periodical dehydration therapy (reducing the pressure of the spinal fluid) and nutritional tissue therapy, which helps to heal fresh wounds and scars, are carried out. The use of psychotropic drugs for the elimination of nervous system diseases is also of little importance (Lewis, Watterson & Houghton, 2003, p. 51). As a result of the conducted experiments, it was determined that treatment with psychotropic drugs reduces the recovery time of speech activity during aphasia. Thus, as a result of such treatment, speech activity of aphasic patients is restored to some extent.

Psychological-pedagogical study of speech defects allows to prevent them. During dynamic aphasia, although the patient does not have difficulty repeating words, naming objects, and understanding speech, the ability to speak in sentences is impaired. There are two forms of dynamic aphasia: one of them is a violation of the programming of thought, and the other is a violation of the mechanism of its grammatical-syntactic organization.

**Efferent motor aphasia** is characterized by a violation of the grammatical structure of the expression with retention of separate words in the speech, and in addition, a violation of its motor scheme; while the patients can pronounce separate sounds, they cannot combine them in a certain sequence. Thus, the sequence of speech formation is disturbed here.

**Afferent motor aphasia** consists of a violation of the degree of clarity of speech articulation. The patient cannot find the appropriate sound he needs and constantly refers to the sound with close articulation. This is where the part of choosing the sounds breaks down.

**Semantic aphasia** manifests itself in difficulties in finding words and in the violation of the semantic (logical-grammatical) relationship between words. For example, while the patient understands the words "father" and "brother", s/he cannot understand what the phrase "father's brother" is. In such cases, there is a violation of the semantic systematicity of words and selection of words according to their meaning (Shazia, 2019, p. 21).

**Sensory aphasia**, first of all, manifests itself in the violation of phonemic hearing during speech perception, or rather, in the violation of the interaction between the sound composition and meaning of the word. In this type of aphasia, sound analysis of words is disturbed.

It should be noted that there are several types of speech activity. Among them, the most basic types of speech are: monologic and dialogic speech, internal speech, written speech.

Monologic speech is a relatively wider type of speech. A monologue is a regular and consistent presentation of one's thoughts and opinions. This speech is an active type of free speech. In order to carry out a monologue speech, the speaker must usually have any content and be able to freely construct his/her statements based on it.

Monologue is continuous, coherent, coherent and logical. In order for this kind of speech to be fluent, the speaker must clearly understand what he is going to say, have a rich vocabulary, master the emotional features of speech, and the laws of language.

**Dialogic speech** is a process of communication between two or more people. This type of speech has several features:

1. Dialogical speech requires a direct reaction, that is, the interlocutor expresses his/her attitude to what is being said. This aspect affects the direction of the speaker to express his opinion and directs him in a certain direction.

2. Dialogue takes place in the conditions of emotional-expressive communication of speaking persons.

3. Dialogue is related to certain circumstances or objects. In this sense, it is situational. As soon as the object changes during the conversation, the direction of the dialogue changes. Aids are used more often during dialogue. For example, tone of voice, mime, pantomime, gesture, etc.

Inner speech (egocentric speech) is a special type of speech activity. It acts as a planning phase of practical and theoretical activities or as a phase of implementation of the plan in a number of specially complex theoretical activities. In this sense, this speech is a speech aimed at the person himself. With its help, a person regulates and controls his/her practical activity. Something differs from egocentric external speech and mutes itself as a partially internalized (inwardly directed) product of it.

**Approbation of research results.** The main provisions of the article are reflected in the author's theses submitted to scientific conferences in Azerbaijan and abroad, as well as in scientific articles published in various journals in Azerbaijan and abroad.

**Conclusions.** Internal speech is characterized by brokenness and fragmentation. It is possible to study the inner speech by recording the movements of the articulation members (lips, tongue, etc.). So, internal (egocentric) speech is a kind of transition stage from external speech to internal speech. Written speech manifests itself as a type of monologic speech. All the features of monologue speech are also characteristic of him, but these features are more noticeable in him. Written speech is more detailed than oral monologue speech. This is due to the fact that there is no feedback with the interloc-

utor in written speech. The most important aspect of written speech is that it is a more arbitrary type of speech. Written speech is verbal speech carried out with the help of texts and differs from oral speech not only by its graphic nature, but also by its own grammatical and stylistic features.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-14>

**THE FORMATION OF FOREIGN LINGUOSOCIOCULTURAL COMPETENCE  
OF STUDENTS OF LANGUAGE SPECIALIZATIONS BY MEANS  
OF VIDEO MATERIALS**

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**Abstract.** The article reflects the experience of using video materials and significant attention is paid to the formation of linguosociocultural competence. The authors emphasize that modern programs provide an opportunity not only to promote the effective development and learning of a foreign language but also to monitor the performance of tasks, to develop training exercises that are individually suitable for each student.

The article highlights the problems that may arise when using video in the educational process, educational materials and combining them into one whole database that is convenient for students, as well as the implementation of the educational process taking into account the state of war in Ukraine.

The components of linguosociocultural competence, the stages of its formation in students of language specializations, exercises that will contribute to its formation when using video materials are considered.

**Key words:** innovation linguosociocultural competence technologies, foreign language, video materials, linguosociocultural competence, video communication, students of language specializations.

**Introduction.** As the conflict in Ukraine unfolded, compelling a significant portion of the population to seek refuge abroad, certain individuals encountered challenges in assimilating into the culture of their temporary host countries. Numerous citizens lacked proficiency in a foreign language, while others struggled to grasp the local rules and political conventions. Additionally, some individuals were unprepared for intercultural communication. This situation primarily arose because they had not prioritized the development of linguosociocultural competence and had not assigned it a central role in their endeavors to learn a foreign language.

Modern linguistics pays considerable attention to the study of issues related to the reflection of national culture and history in a certain language, because the role of language in the accumulation of cultural achievements is significant. It reflects all aspects of the people's life – geographical location, climate, lifestyle, moral norms and values. The language reflects the national character and creates

a unique picture of the world for people who use it as a means of communication, as it preserves the cultural values and heritage of the people in vocabulary, grammar, folklore, literary works, etc.

That is why it is no coincidence that one of the goals of teaching a foreign language in a higher educational institution is the formation of the teacher's linguosociocultural competence.

The use of video materials is a particularly useful tool for the formation of linguosociocultural competence. This will interest students and allow them to practice listening to a foreign language.

**Main part.** Currently, there is a plethora of publications, prominent articles, and conferences dedicated to the advancement of modern education. These discussions primarily center around the integration of state-of-the-art technologies into the teaching of foreign languages. Emphasis is placed on exploring the potential for incorporating a wide array of knowledge acquisition methods, along with addressing additional challenges that may emerge during the application of innovative technologies in education.

The problem of the formation of linguosociocultural competence is highlighted in the research of such scientists as: M. Natsyuk, I. Bronetko, L. Horodetska, V. Sysoev, K. Antipova, O. Vozniuk, I. Beam, R. Gurevich, S. Nikolayeva, V. Safonova, V. Maslova, A. Hordeeva, S. Ter – Minasova, N. Borysko and others. An important role is played by the works of V. Safonova and V. Furmanova, which are dedicated to the study of global and general issues of intercultural communication, as well as cultural and linguistic pragmatics in the theory and practice of foreign language teaching.

The problem of professional training of prospective foreign language teachers is revealed in the studies of: I.N. Vereshchaginoi, N.D. Galskova, O.O. Myrolyubova, S.Yu. Nikolayeva, Yu.I. Passova, G.V. Rohova and others. The researches of A. Aleksyuk, S. Honcharenko, R. Gurevich, A. Pavlenko, O. Pehoty, O. Pometun, S. Stetsenko, L. Pyrozhenko, and others are devoted to the analysis of innovative technologies and teaching methods. N. Pshenyannikova, M. Rudenko, O. Bogdanova and other researchers worked on the study of the effectiveness of using video materials in foreign language classes.

The effectiveness of the use of video materials, in foreign language classes was considered by L. Petryk. Studies of the psychological features of students' development are researched in the works of Sh.O. Amonashvili, L.I. Bozhovich, L.S. Vygotsky, V.V. Davydov, V.Ya. Liaudis, L.S. Slavina. However, despite the significant contribution of scientists, some issues of this topic still remain understudied.

The *purpose of the article* is to highlight the role of video materials in the formation of linguosociocultural competence, the importance of innovative technologies, ensuring a high-quality and continuous educational process in the conditions of martial law in Ukraine.

The set *goal* is implemented through a number of tasks: to characterize linguosociocultural competence; to study the psychological characteristics of students of language specialties and take them into account when determining the requirements for exercises regarding the use of video materials in English classes; to develop a system of exercises for the use of video materials in teaching English to students of language specialties.

*The main method* of the research is a critical analysis and generalization of theoretical sources, as well as the own work on the use of video materials in teaching English to students of language specialties.

According to the foreign language curriculum for higher educational institutions of Ukraine, the main task of modern teachers is the formation of students' foreign language communicative competence (Bronetko, 2014: 183–186). In order to actively participate in the dialogue of cultures, to fully understand a foreign language, its speakers and their intentions, it is extremely important to have well-developed linguosociocultural competence, which means the ability and readiness of an individual for foreign language intercultural communication (Abramovych, 2013: 27).

The purpose of the teacher's development of the specified competence is the formation of correct and appropriate speech behaviour of the student in various situations in the conditions of intercul-

tural communication. A student must possess not only a high level of language (phonetic, lexical, grammatical) and speech (speaking, listening, reading, writing), but also have a sufficient base of sociocultural knowledge, be able to understand foreign language realities, compare and contrast them with their own culture, be able to analyze and think critically, find connections between phenomena (Bochkarjova, 2007: 12).

The formation of linguosociocultural competence is an important element in learning a foreign language, the purpose of which is to ensure effective communication and mutual understanding between people from different cultures, which means not only knowledge of the language and linguistic means, but also awareness of the cultural and social life of the country whose language is being studied.

S.Yu. Nikolayeva emphasizes that linguosociocultural competence includes three components: 1) sociolinguistic competence; 2) sociocultural competence; 3) social competence (Nikolajeva, 2010: 13).

In the process of learning, the teacher takes into account and shapes the sociolinguistic experience of students, since the language reflects the peculiarities of the lives of people who communicate with it, their values, customs, traditions and other cultural features.

First of all, it is worth noting that the teacher's development of students' sociolinguistic competence contributes to the creation of motivation for independent language learning, helps to consciously learn the material, develops critical thinking, the ability to compare, analyze and draw conclusions. According to S.Yu. Nikolayeva, sociolinguistic competence is the ability to correctly choose language forms, use them and adapt them according to the context, the ability to realize the connections between language and the phenomena of social life (Nikolajeva, 2010: 14).

Sociocultural competence is a set of knowledge about the rules and social norms of behaviour of the speakers of the language being studied, their traditions, history, culture, social system of the country, its organization (Bronetko, 2014: 183–186). In the process of learning a foreign language, the teacher introduces students to a new culture, so the ability to understand certain features of its development, to take into account rules of behaviour, norms of etiquette, and certain stereotypes when communicating with native speakers is extremely important. It should be noted that sociocultural competence is formed as certain background knowledge, students' awareness of various phenomena of social and cultural life, certain generally accepted norms, behavior patterns that determine lifestyle, etc.

The content of foreign language learning for students is created based on the ideas of mastering it in the intercultural paradigm, which involves the interconnected learning of language and culture (Bronetko, 2014: 183–186).

S.Yu. Nikolayeva considers social competence as the direct ability and readiness to communicate with other people, the ability to navigate and manage a social situation. This competence implies the readiness and desire to cooperate and interact with the interlocutor, self-confidence, the ability to solve certain problems that may arise in the process of communication, the ability to put oneself in the place of another (Nikolajesku, 2014: 52; Bighych, 2013: 267).

The ideas of the Ukrainian scientist O. Nikolaescu, who considers social competence as "the process and result of assimilation and active reproduction by an individual of socio-cultural experience (complex of knowledge, skills, values, norms, traditions) based on his activities, communication, relationships, are very apt. as an integrative result, which involves a shift of emphasis from their accumulation to the formation of the ability to apply experience in solving life problems, take responsibility, show initiative, activity in teamwork, warn and resolve conflicts, be tolerant in difficult situations, show empathy" (Nikolajesku, 2014: 47).

It is worth noting that the teacher should take into account all the above-mentioned components when preparing for the formation of linguosociocultural competence of students. After all, by neglecting at least one of these components, students will not be able to fully develop the studied phenomenon.

The use of video materials in the educational process in the process of learning a foreign language greatly facilitates the understanding of the material, allows you to present interesting facts visu-

ally and within a relatively short time, observe and analyze the correct pronunciation of words by native speakers, promote the development of mental processes, makes it possible to simultaneously engage several channels of information perception (under 15% of information is absorbed during auditory perception, 25% during visual perception, and 60% during auditory perception, which in turn increases the effectiveness of students' understanding of the content of the educational material (Panova, 2010: 158).

The use of video materials in the educational process in the process of learning a foreign language greatly facilitates the understanding of the material, allows you to present interesting facts visually and within a relatively short time, observe and analyze the correct pronunciation of words by native speakers, promote the development of mental processes, makes it possible to simultaneously engage several channels of information perception (under 15% of information is absorbed during auditory perception, 25% during visual perception, and 60% during auditory perception, which in turn increases the effectiveness of students' understanding of the content of the educational material (Panova, 2010: 126).

The created video materials can be used at any stage of the lesson. For example, at the beginning of the lesson as a phonetic exercise, where students can not only hear the clear correct pronunciation of words, but also for a deeper understanding see the plot in question; at the stage of explaining new material, where at the same time you can repeat the lexical units you have passed, listen to the text for listening, show pictures for further speaking, create an imaginary journey through new lexical units, turn on a small video about language structures, explain a certain type of sentences or time; as a physical exercise minute to switch the type of activity of students and prevent fatigue; during the final part of the lesson in the form of a game to consolidate the material, etc.

The work on the use of video materials in a foreign language lesson in the formation of linguistic and sociocultural competence involves the fulfillment of a number of requirements:

- video materials must correspond to the topic provided by the program;
- before watching the video material, the task for which the video is used is clearly formed beforehand;
- videos are short in time, should take no more than 10 minutes or be divided into meaningful sections that can be repeated several times during the lesson (Panova, 2010);
- the announcer's pronunciation must be clear and understandable;
- video materials should correspond to the age characteristics of students;
- the material selected on the video recording should be based on the existing level of knowledge of the students and their experience;
- after watching the video, it is mandatory to complete tasks based on the content of the material presented (Pshenjannikova, 2012: 7).

The use of video in the formation of the foundations of linguosociocultural competence is undoubtedly very effective for a number of reasons:

1. Increasing motivation.
2. Visualization (setting, characters, actions, objects).
3. Better understanding of vocabulary (visualization of vocabulary, guessing the meaning during viewing, better memorization).
4. Improving grammar and pronunciation.
5. Immersion in the cultural environment.
6. It is worth mentioning the requirements for video materials in the formation of the foundations of linguosociocultural competence. The main criteria for selecting video:
  1. Authenticity.
  2. Sociocultural component.



3. Motivation component.
4. Information component (informative).
5. A series of vocabulary.

The traditional main stages of the use of video materials in the formation of the foundations of linguosociocultural competence:

1. Pre-watching.
2. While-watching.
3. Post-watching (Bihych, 2013: 434).

Let's consider groups of exercises related to each stage.

#### **Pre-watching**

I. A group of exercises focused on developing anticipation and predictive skills.

1. Exercises aimed at removing linguistic difficulties (vocabulary, grammar, phonetics)
2. Exercises aimed at stimulating learners' experience on a definite topic in terms of content and culture anticipation
3. Exercises aimed at developing learners' skills to predict linguosociocultural information.

#### **While-watching**

II. A group of exercises focused on extracting information from country-study materials.

1. Exercises aimed at developing skills to understand general information
2. Exercises aimed at developing skills to recognize specific information
3. Exercises aimed at developing skills to identify detailed information

#### **Post-watching**

III. A group of exercises focused on presenting linguosociocultural information in bilingual environment.

1. Exercises aimed at analyzing and interpreting linguosociocultural information
2. Exercises aimed at developing skills to create a linguosociocultural picture of English speaking countries and to compare it with native culture
3. Exercises aimed at determining and testing the level of linguosociocultural formation.

**Conclusions.** The importance of incorporating video materials in foreign language learning is underscored, given that contemporary language education, both in learning and teaching, can greatly benefit from an innovative component facilitated by modern computer technologies. This avenue offers a substantial opportunity to enhance the educational process and elevate the effectiveness of learning to a new level. The utilization of video materials in foreign language classes not only heightens students' interest in language acquisition but also opens up significant avenues for advancing the competence of future specialists.

Throughout the various stages of fostering linguosociocultural competence with the aid of video materials, there is a concurrent development of sociocultural, sociolinguistic, and social knowledge, skills, and abilities. The teacher should be cognizant that a pivotal role is assigned to the psychological component of students' attitudes towards other cultures, contributing to a comprehensive and well-rounded language learning experience.

The article does not cover all aspects of the research problem. Further scientific interpretation requires the determination of the conceptual foundations of this process in the outlined direction, the development of technologies and the creation of appropriate educational and methodological support for teaching English in secondary schools, the study of foreign experience of its organization.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-15>

## DIGITALIZATION OF PHILOLOGICAL EDUCATION IN UKRAINE: OPPORTUNITIES AND PERSPECTIVES

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**Abstract.** The paper analyses the opportunities and perspectives of Ukrainian philological education digitalization. The development of philological education in Ukraine in the context of digitalization requires new approaches and tools for teaching and learning language, literature, and culture. Digitalization makes it possible to expand access to knowledge and information, promotes creativity and improves learning efficiency. A thorough analysis of the benefits and drawbacks of Ukrainian philological education digitalization has been carried out. It is concluded that the implementation of digitalization in philology education in Ukraine has the potential to transform teaching and learning, contributing to a more innovative and globally competitive educational environment.

**Key words:** learning apps, teaching, internet, artificial intelligence, technology, ChatGPT.

**Introduction.** Nowadays, there are positive transformations in Ukrainian higher education as the traditional model does not meet the current needs of society (Ivanytska, Dovhan, Tymoshchuk, Osaulchyk, Havryliuk, 2021). The scholars claim that ‘the educational events of the last decade have given impetus to significant changes in the education system in Ukraine’ (Zahorodna, Saienko, Tolchieva, Tymoshchuk, Kulinich, Shvets, 2022: 78). Modern foreign language teaching is closely related to innovative processes in education. The evolution of technology has significantly influenced teaching approaches. The role of digital resources and interactive techniques has increased recently (Zamkova, Tymoshchuk, Havryliuk, 2023). However, foreign language learning in the context of digitalization faces a number of challenges and problems that may affect students’ learning and performance, and therefore require attention and research. It is important to consider and study the issues of digital competence and literacy of the educational process participants, as well as ways to implement digital pedagogical technologies in the educational process, taking into account all the characteristics of learners. The development of philological education in Ukraine in the context of digitalization requires new approaches and tools for teaching and learning language, literature, and culture. Digitalization makes it possible to expand access to knowledge and information, promotes creativity and improves learning efficiency.

**Analysis of recent studies and publications.** Recently, outstanding Ukrainian and foreign scholars have conducted a number of studies on the digitalization of education. The concepts of ‘informatization’ and ‘digitalization’ in the context of digital transformations and topical issues of digital humanistic pedagogy are discussed (Matviienko, Tsyvin, 2020); current issues and trends in the transformation of the educational environment are studied, taking into account the introduction of information digital technologies. Scientists consider the possibility of synchronizing strategic goals aimed at ensuring broad access to digital technologies and resources in education, as well as improving the learning experience and educational process management (Zhernovnykova, 2018). The digitalization of the educational process is considered to be a compulsory area of development for most higher education institutions, which requires the use of all available resources, the implementation of necessary technological solutions, a change in the outlook of all participants in the

educational environment and support from the government within the national digital education programs (Mishchenko, Kuznietsova, Andriichyk, 2022; Prokopenko, 2022; Tymoshchuk, 2022; Sukhonos, Harust, Shevtsov, 2019).

According to Ukrainian scholars, the philological science and education digitalization is one of the modernization trends. The scientists argue implementation of all possible electronic tools, online services and applications in the educational process is promising (Vydaichuk, Rusachenko, 2023).

Prominent Ukrainian and foreign scientists (S. Batsenko, Yu. Harust, O. Hlazova, O. Denysenko, N. Dyka, M. Zhovnir, V. Kyrylenko, V. Kovalenko, T. Leshchenko, M. Marienko, T. Romashko, V. Sukhonos, Yu. Trach, Yu. Chaliuk, Ya. Shevtsov, O. Shevchenko, O. Shparyk, S. Awasthi, N. Saeed, H. Al-Samarraie, Y. Soni) have researched various issues of philological education digitalization. Their works are a significant theoretical basis for our study.

**The purpose of the study.** This article aims to analyze the development of philological education in Ukraine in the context of digitalization of the educational process.

**Methods of the study.** The study employs general scientific methods (analysis, synthesis, comparison, generalization) as well as highly specialized. The method of literature review is used to summarize educational experience of digitalization of the educational process.

**The findings of the study.** Digital technologies are an integral part of the new social development reality, significantly change the learning process in schools and higher educational institutions. Digitalization of education is a process of systemic modernization of the educational space based on the use of digital technologies (Sukhonos, Harust, Shevtsov, 2019).

The most effective innovative strategies in philological education include communication, social, cognitive, and metacognitive. These strategies are aimed at developing communication skills, forming cultural competence, developing critical thinking, and increasing the level of digital literacy. Students who have the skills to use a wide range of learning strategies can improve their knowledge and skills more effectively. Mathematical and cognitive strategies in philological education improve the organization of academic time, self-control, and self-assessment (Jalilbayli, 2022: 38). Students can carry out various projects, participate in scientific conferences and virtual excursions, and watch online broadcasts of various educational events by using digital technologies. In general, the advantages of digitalization of philological education and science include convenient search for information; motivation to learn due to interactivity, flexibility and diversity of information; access to information from any location; the ability to use not only ready-made content but also create your own (Bader, Oleksiienko, Mereniuk, 2022: 25).

However, the digitalization of education has certain risks. The main risks of digitalization of education are the following: the risk of using insufficiently researched technologies; the risk of worsening the ability to perceive more information due to so-called ‘digest mania’; the risk of so-called screen addiction among students, the risk of a possible mental decline, which many experts consider to be ‘the development of digital dementia’; the risk of displacement of live communication; health-related risks; risks of information manipulation (Romashko, 2021).

Digitalization has significantly transformed philological education, integrating technology into various aspects of language and literature studies. Let’s consider the main components of philological education digitalization.

1. Online resources and databases. Digital collections of texts, manuscripts, literary works, and linguistic resources enable students to analyze materials from any location.

2. E-learning platforms offer courses, lectures, and interactive materials on philological studies. They often incorporate multimedia elements, discussion forums, and assessment tools to facilitate learning.

3. Digital tools are helpful in linguistic analysis. These tools, such as corpus linguistics software, help students conduct profound research.



4. Virtual libraries and museums. The digitized collections of libraries, museums, and historical sites allow students to explore cultural and literary heritage from anywhere in the world.

5. Collaborative and Remote Learning. Online collaboration tools facilitate teamwork among students and scholars worldwide. Video conferencing, collaborative editing, and shared workspaces enable real-time interactions and collaborative research projects.

6. Language Learning Apps and Software. Interactive language learning apps offer personalized, adaptive exercises and multimedia content to improve language learning and proficiency.

7. Social networks and online communities. Platforms such as forums, social media groups, and academic communities provide a space for discussion, knowledge sharing, and networking among philologists across the globe.

8. Artificial intelligence services. AI can help teachers detect plagiarism, evaluate student performance, curate and create educational materials.

The integration of these components strengthens traditional philology education, offering new opportunities for research, collaboration, and engagement in the field.

Scientists suggest that the implementation of various types of digital technologies in the educational process is one of the main directions of digitization of philological education and science (Makarenko, Pevse, 2022: 145). It is known that digital educational technologies are a type of information technology and involve working with a wide range of digital resources and can perform various functions. As far as different functions were concerned, we mean two basic functions, i.e., providing information and creating it. Dictionaries, electronic libraries, translators, educational platforms, and language learning apps provide information. Online tests, questionnaires with data consolidation, presentations and infographics are created by means of digital resources.

In Ukraine, teachers are actively using various platforms such as Google Meet, Zoom, Skype, Microsoft Teams, Classtime, Cisco Webex Meetings to conduct distance learning. Some distance learning platforms, such as Prometheus, Khan Academy, and VUMonline, provide online courses and video tutorials that can be used in various educational programs. YouTube channels with lessons and online learning studios, such as WiseCow and EdEra, are also sources of knowledge and learning resources (Kyrylenko, Chaliuk, 2022: 27).

Speaking of philological education digitalization, we need to consider artificial intelligence (AI) and machine learning. AI incorporates different branches, such as machine learning, natural language processing, and computer vision, and has proven its effectiveness in various industries, including healthcare, finance, and education, by providing increased efficiency, reduction of payment, and enhanced decision-making processes (Joiner, 2018). 'With the rapid development of technology, artificial intelligence has emerged as a good tool in education, providing students with efficient learning experiences' (Sabadash, Hanzin, Pavliuk, Drahan, 2023). According to Marienko M., Kovalenko V., AI can be used to help students perform routine tasks in the learning process and assess their current level of knowledge (Marienko, Kovalenko, 2023). The main benefits and uses of AI in education system are presented in Table 1.

Nowadays, scholars suggest the diversification of AI education applications, i.e., programmed learning and other open-source high technology. They 'contain tracks that suit all learners despite differences among their levels, boost their learning motivation, and cope with students' low levels of attention' (Kushmar, Vornachev, Korobova, Kaida, 2022: 265). These applications provide feedback that indicates student achievement levels and points of weakness and strength in the scientific content. Instructors monitor this process and provide guidance and feedback. AI tutoring systems can replace instructors as they have programs that provide advice automatically and enable learners to use self-study skills (Kamuka, 2015).

Chat GPT is a recent service of AI that has gained unique attention in the education sphere. Chat GPT has several benefits such as:

Table 1

**The Potential Benefits and Uses of Artificial Intelligence in Education System  
(Awasthi, Soni, 2023)**

Benefit	Usage
Personalization	AI systems adapt to each individual student's learning needs and target according to their strengths and weakness.
Tutoring	AI systems analyses and observe student's current style of learning and pre-existing abilities then deliver customized content pattern and support.
Grading	AI systems do grading not only objective answers but also on descriptive answers
Meaningful and real time feedback to students	With AI, students feel free to make mistakes which are an integral part of learning and then receive real time feedback to do necessary correction.
Free up time	With AI the education centers can reduce time of teachers from various tedious task and use that free up time for much productive execution of course
Adaptive Learning	Used to teach students at entry level then gradually move next stage by completing the previous one so they can become proficient
Assistive Learning	AI can enable students to access equitable education as per need, for example by reading content to a visually impaired student
Early Childhood Education	AI is currently used to present interactive games which teaches and develops the basic ethical and academic skills in children
Data and Learning Analysis	Nowadays AI used by faculties and education administrators to analyze and interpret educational data
Scheduling	In educational institutions it helps administrators to schedule classes, courses and teachers to make and plan their daily, weekly, monthly and sessional curriculum schedules
Facilities Management	AI is very effective at monitoring the current status of various facilities in educational institutions
Overall School Management	Currently AI is used to manage schools, records of students, vehicles, IT, time tables and budget
Content Writing	AI applications which convert voice into text are widely used

1. **Personalization:** ChatGPT provides a customized learning experience that meets the unique needs and interests of each learner. This customization increases engagement and motivation, leading to more effective learning.

2. **Accessibility:** Remote access to ChatGPT allows students to study at their convenience, regardless of location or time. This flexibility helps students better manage their work, study and personal responsibilities.

3. **Efficiency:** ChatGPT helps teachers optimize assessment processes and provide personalized support to students by offering instant feedback to students. This efficiency allows teachers to devote more time to important tasks such as lesson planning and classroom management to make learning more motivating (Sabadash, Hanzin, Pavliuk, Drahan, 2023).

4. **Enhanced Learning:** The use of Chat GPT can enhance student learning by providing a more engaging and interactive learning experience. This can lead to better academic outcomes and increased motivation for students (Mallow, 2023).

The positive impact of artificial intelligence, including Chat GPT, on education is clear, but there are also several potential drawbacks that cannot be ignored. Communities working at the intersection of artificial intelligence, learning, and higher education should carefully consider these implications (Bates, Cobo, Mariño, Wheeler, 2020). Educational institutions should proactively address the potential downsides of integrating AI into education to maximize its benefits and minimize its risks. The main drawbacks of using Chat GPT in learning are presented in Table 2.

Table 2

**Drawbacks of using Chat GPT in learning (Sabadash, Hanzin, Pavliuk, Drahan, 2023)**

<b>Drawback</b>	<b>Description</b>
Dependence	The extensive use of Chat GPT may lead to students becoming overly reliant on the model, which could negatively affect their critical / analytical thinking skills and learning independence
Bias	The data used to train Chat GPT may already contain certain biases, such as those related to race or gender. As a result, the model may perpetuate these biases rather than challenge them.
Ethics	There are ethical considerations associated with the use of Chat GPT, particularly with regard to data privacy, security, and ownership. Appropriate safeguards must be implemented to ensure that students' data is protected and used ethically.
Technical limitations	While Chat GPT has the potential to enhance personalized learning experiences, it may not be suitable for all types of learning activities or subject areas.
User interface	The user interface of Chat GPT may not be easy to navigate or intuitive for all students, especially for those who are not proficient with technology.

Thus, AI, particularly Chat GPT, is a promising tool for supporting learning in higher education, offering opportunities to enrich personalized learning, increase its accessibility and effectiveness. However, the use of Chat GPT is faced with issues such as addiction, bias, ethical concerns, technical limitations, and user interface issues. Educational institutions should overcome these challenges by implementing measures to optimize the educational benefits of AI.

Furthermore, it is important that teachers of philological subjects have the necessary qualifications and knowledge of digital technologies to effectively apply them in teaching. Researchers consider that the effective use of digital technologies in philological education requires new skills, in particular, knowledge of programming, digital content creation, and media editing (Velieva, 2022). In the modern world, digital skills are among the necessary basic ones. The ability to use digital tools to solve everyday problems and quickly master new technologies is one of the key requirements for a qualified specialist, particularly in linguistics (Upadhyay, 2020).

Ukrainian philological education in the context of digitalization requires the development of new trends allowing students to successfully study languages, literature and other subjects in the fast-paced world of technology. The main trends include 1) development of electronic libraries and archives (higher education students need to have access to digital libraries and archives to study and analyze texts); 2) access to online courses and webinars by leading teachers and scholars in linguistics and literary studies (students will learn about the latest trends in the field and study philological subjects with leading experts); 3) the use of social networks to increase interactivity and attract higher education students to the study of philological sciences; 4) development of critical thinking and analytical skills of higher education students, particularly the ability to critically evaluate the information they find on the Internet (Kholod, Honcharuk, Stokolos-Voronchuk, 2023). In general, digital resources play an important role in philological education, improving the quality of learning and developing critical thinking of students. They enable fast search of information, effective learning of new material, and convenient communication with other students and teachers (Sobchenko, 2021).

According to Nikitina, 'not only digital and information technologies themselves are important, but also their correct selection, combination, and management to establish effective work, the interaction between a lecturer and a student' (Nikitina, 2021: 137). The advantages of digital transformation of linguistic education are obvious. This is the provision of favorable conditions for: 1) developing skills to study independently, to allocate the most valuable material for self-development; 2) forming personal mobility, the ability to adapt to changing conditions unpredictably, quickly, and

rapidly; 3) strengthening motivation for self-education and self-development in a multicultural environment; 4) reaching a diverse audience (the content becomes personalized), ensuring cooperation and integration of language education; 5) forming an individual educational trajectory; 6) learning in the most convenient conditions – at a comfortable pace, but with optimal use of the time allotted to perform certain tasks (Law of Ukraine on Higher Education, 2021).

Scholars emphasized that digitalization is the transition from the education ‘for all’ to the education ‘for everyone’ (Nikitina, 2021: 137). The modern educational space is currently developing, creating all the conditions for mastering basic multilingual competencies.

Thus, using the digital technologies has opened up new channels of communication and cooperation in the educational process, encouraging students’ motivation and their active participation in learning, developing the processes of mutual assessment and feedback in the ‘lecturer –student’ system. The digital technologies are used to revitalize and individualize education, saving time and resources, much more efficiently than traditional teaching.

**Conclusions.** Nowadays digitalization is a key factor in improving the education system, including the philological one. The digital technologies provide a number of benefits, particularly, the optimal use of time for more effective formation of the key competencies of specialists in a multicultural language environment. Digitalization makes the educational process more personalized, accessible, and flexible, providing a comfortable environment for self-study, effective development, and career growth.

It is now important to ensure the required level of computer literacy of teachers and students, as well as the proper development of digital infrastructure at universities. We should remember the importance of humanitarian competencies, which are no less important in the digital age. Thus, the development of philological education in the context of digitalization requires the integration of digital technologies with traditional teaching methods and the preservation of the humanitarian component of the educational process. The implementation of digitalization in philology education in Ukraine has the potential to transform teaching and learning, contributing to a more innovative and globally competitive educational environment. Adaptation and thoughtful implementation will be key to taking advantage of these opportunities and realizing the full potential of digital education in the field of philology.

This study confirms the relevance of digitalization of the educational environment in the context of the formation of key competencies of future specialists in the field of philology, and proves the need for further development of the problem, particularly, the search for more effective ways to implement digitalization as a set of means that optimize learning, to provide personalization and automation of educational processes.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-16>

## PEDAGOGY AS A MODERNIZATION STRATEGY IN THE MODERN EDUCATIONAL ENVIRONMENT OF UKRAINE

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**Abstract.** The article covers the specifics of art pedagogy, the peculiarities of its historical development, and its modernization potential amidst modern Ukrainian education. The connection of art pedagogy with traditional principles of educational work is noted, and such means of art pedagogy as fairy tale therapy, drama therapy, etc. are distinguished. It was found that art tools positively affect various students' abilities, and the process of creating harmonizes the emotional state of a person. The goal of art pedagogy as an activator of the child's cognitive activity is formulated. The principal activity areas of art pedagogy and their significance in the development of personality-oriented education and upbringing are analyzed. It is justified that teaching and education through art solve many pedagogical tasks, in particular, they activate the cognitive abilities and psycho-emotional state of students with special educational needs.

**Key words:** pedagogy, art pedagogy, art therapy, education, art, fairy tale therapy, music therapy, drama therapy.

**Introduction.** Nowadays, the educational space of Ukraine needs a drastic renewal, both in terms of theory and practical implementation of pedagogical ideas. Among numerous innovative methods, art pedagogy holds a special place as it aims to identify the personal dimensions of learning and education that is up-to-date and appropriate right now when the humanization and humanitarization of education are taking place. Art pedagogy has ancient origins, but it is currently perceived as an innovation as it is, given its widespread introduction occurred in the late 20<sup>th</sup> – the early 21<sup>st</sup> century. The peculiarity of art pedagogy is the realization that the learning process should be joyful, creative, and open, and art helps to actualize the potential of joy inherent in the creative process. Modern pedagogical discourse requires a comprehensive understanding of the phenomenon of art therapy and its educational potential, so relevant publications are essential and timely.

**Basic material statement.** Studies of art therapy and art pedagogy as education modernization strategies are currently much needed in Ukrainian pedagogy. Both well-known academic and practicing pedagogues, who offer specific ways to involve art pedagogy in the educational process, joined in solving the issues of strategies. Solid scientific achievements lie in the works of O. Voznesenska (Voznesenska, 2005, 2007), O. Derkach (Derkach, 2015), M. Zameliuk (Zameliuk, 2018), R. Pavliuk (Pavliuk, 2018), R. Prima (Prima, 2016), O. Sotnikova (Sotnikova, 2017), O. Soroka (Soroka, 2017), O. Tadeush (Tadeush, 2020), and others. Thus, R. Pavliuk conceptualizes art pedagogy as an independent science, its content, significance, and forms of implementation in the educational process. O. Derkach analyses the educational potential of art pedagogy, and O. Tadeusz marks the technological polyfunctionality of art pedagogy, emphasizing that “the introduction into the educational process of diverse didactic theatrical forms (role-playing games, imitation games of images of literary and artistic characters, text-based role dialogues, staging works, staging performances based on one or several pieces, improvisation with acting out an episode off-the cuff) turns the study of curriculum subjects into an interesting lesson, promotes the development of concentration, observation, attention...” (Tadeush, 2020, p.119). R. M. Prima and T. V. Aleksintseva generalize interpretations of “art pedagogy” and “art therapy” and highlight the main approaches to these concepts. Scholarly papers devoted to the specific forms of introducing art pedagogy spark interest. Therefore, M. Zameliuk and S. Milishchuk are confident that isotherapy, music therapy, fairy tale therapy, drama therapy, and dance/movement therapy contribute to the creative imagination of preschool children, “which is the most important for laying the groundwork and prerequisites for their development” (Zameliuk, Milishchuk, 2018, p. 53). It is no question that modern Ukrainian pedagogy is constantly replenished with significant works which comprehensively deal with such a topical issue as the introduction of art pedagogy. However, art pedagogy is a multifaceted realm that requires contributions elucidating its potential in the context of inherent modernization and innovation components. The main task of the present study is to identify the pedagogical potential of art pedagogy in the educational space of Ukraine and characterize the key activity areas of art pedagogy, the background of art pedagogy ideas, and the specifics of its technologies (music therapy, fairy-tale therapy, role-playing games, etc.).

**Material and research methods.** Strategies for updating the educational space of Ukraine should be based on non-standard approaches with a person-centered orientation of the educational process. Art pedagogy, which uses various art forms for the all-round development of an individual, is crucial in this regard. The creation process always brings joy to individuals and harmonizes their emotional state, which poses a great demand for the potential of joy both in leisure and in such a significant realm as educational activity. R. O. Pavliuk rightly notes: “Among numerous directions and branches of modern pedagogy, we are most interested in education and training based on artistic culture” (Pavliuk, 2018). According to the researcher, such education and training aim “to form a new-generation personality – a personal subculture capable of reproducing and preserving cultural values in the educational process” (Pavliuk, 2018). At the same time, many scientists urge not to identify and replace the concepts of art pedagogy and artistic education. “Within training, art pedagogy as a branch of scientific knowledge allows us to consider not only artistic education, including all components of the educational process (education, training, upbringing), via art tools and build foundations for a child’s artistic culture” (Pavliuk, 2018, p. 4).

Since ancient times, artists themselves and teachers, who realized art’s strong cognitive and educational potential, marked the effect of various art forms on the mind, will, and feelings of the audience. The ancient inhabitants of our planet were convinced of the effectiveness of man-made rock images, ritual songs, and ceremonial dances. Thus, the legend of Orpheus attributes to him the invention of music and verse and says that he could bend the branches of trees with his singing, move stones, and tame wild animals. Ancient thinkers and artists believed that the world of artistic images was an integral part of everyone’s life.



Ancient Greek philosophers highly valued the role of art in the life of society and the individual. Thus, following Plato (428-327 BC), art can fill people's educational gaps, although, for the rest of his life, he was skeptical about the cognitive capacity of art. In contrast, Aristotle (384-322 BC), considering an individual as a creature already naturally destined for social life, believed they could develop only in a community. And since art, in his opinion, is capable of a deep knowledge of reality, it affects people morally and aesthetically, forming their character and feelings. Moreover, the power of art is in generalization, and the poet's mission is to talk not only about what happened but also about what could happen and, hence, about what is possible by probability or necessity. In modern terms, Aristotle represented the capacity of art to model life. Therefore, the philosopher attributed art to activity and creativity: it reproduces the world "by restructuring". According to contemporary scientists, "it shapes – sometimes unconsciously – the very system of human institutions, the effect of which will appear sooner or later and often unpredictably. It is more than intended to induce an individual to a particular act."

Figures of the Renaissance, Baroque, and Classicism also shared the views of ancient philosophers and founders of aesthetics as a science of beauty.

Artistic and aesthetic achievements of European art influenced the progress of world art of the 18<sup>th</sup>–19<sup>th</sup> centuries, i.e., architecture, painting, theater, music, everyday life, other social aspects, and the work of masters of culture and art. But it should be remembered that culture always implies the preservation of previous experience, is connected with history, and involves the continuity of the moral, intellectual and spiritual life of man and society.

Modern problems of education intensify research in different sciences to integrate school educational disciplines with pieces of national culture and art to overcome the traditional rationalistic approach to training and developing students to the detriment of their all-round development. Representatives of school pedagogy and methodology and domestic masters of culture were encouraged to settle the relevant issue. All of them are united by a deep conviction that the educational impact of art is expressed in a beneficial effect on the individual's inner world, especially the moral and aesthetic spheres. Thus, a specific branch of the pedagogical discourse – pedagogy of art – was born in the late 20<sup>th</sup>. It gave rise to such types of creative activity of teachers and students as museum pedagogy, musical pedagogy, theatrical pedagogy, ethno-cultural pedagogy, school of the dialogue of cultures, and other artistic strategies of national education, which were recognized by the pedagogical community and parents and were called creative pedagogy.

Art, by comprehensively influencing people – "humanizing" them, and enriching and expanding the aesthetic world of students with various art forms – proves that beauty will save the world.

Pedagogical practice shows that, for example, combining Ukrainian language and literature lessons with visual activity contributes to the intensification of students' knowledge of their native language and also determines the need to comprehend works of culture and art; helps to overcome uncertainty before a public speech; improves the communicative abilities of students, especially children with developmental language impairments.

When implementing such programs in the activities of schools of various types, the most important feature of art was identified – its transforming function, which positively affects the intellectual, psychophysiological, moral, emotional development of children and contribution to the identification with their people and values of their history and culture. This can explain the intensive development of art pedagogy – a new scientific and practical pedagogical branch of the early 21<sup>st</sup> century, which studies the patterns, principles, and ways of involving artworks in solving many pedagogical and methodological tasks of educational institutions. O. M. Tadeush distinguishes the following main functions of art pedagogy: motivational-educational, cognitive, axiological, communicative, hedonistic-recreational, creative-stimulating, and corrective [Tadeush, 2020, p. 118–119]. As you can see, these functions basically coincide with the functions of culture per se, which allows us to assert the

narrowness of art pedagogy and culture, or rather art pedagogy is a technological component of culture.

There are three main activity areas in art pedagogy (AA in AP):

1 – AA in AP can “be an equal source of study information, a kind of “voice” in the educational dialogue, rendering the emotional experiences of another person”, can “create a field of various associations, feelings, and thoughts”;

2 – AA in AP optimizes the conditions of pedagogical interaction, enhances arbitrary and involuntary attention to art pieces, prevents overwork, switches from one type of activity to another without tension; facilitates comprehension and memorization of academic material, provides motivational, emotional and communicative readiness for the perception of relevant material by transcoding information from logical-verbal to emotional-figurative modality;

3 – art pedagogy tools can become a source of implicit diagnosis of the mental state of students and their creative abilities within the educational process.

It is essential to note that the progress of art pedagogy and its didactic functions were affected by art therapy as a kind of psychotherapy and psychological correction based on art and creativity. At the same time, pedagogy cannot perform improper functions, i.e., medical, psychotherapeutic, psychological, although artistic creativity often gives a therapeutic result. R. M. Prima and T. V. Alekintseva state that “comparing art pedagogy with art therapy, one should pay attention to the fact that latter actualizes the development and correction of a person by relying on his available properties, and former refers to what is not yet in a person but can be shaped in the future” (Prima, Aleksintseva, 2016, p. 8).

Art therapy has a centuries-old history. Jean-Jacques Rousseau, the 18<sup>th</sup>-century French philosopher, is traditionally considered its founder. He was one of the first to realize that in order to understand the child, it is necessary to observe their play. But play as a method of psychotherapy began to be used only in the 1920s by psychoanalysts Melanie Klein and Anna Freud, the daughter of Sigmund Freud. Watching children’s play, they noticed that “in the game, the child not only expresses his experiences. Play turned out to be a form of self-therapy with the help of which the kid can recreate, e.g., a conflict situation, and find a way to “react” to it.” In the 1930s, Frederick Allen expanded the scope of art therapy: in his research, he focused on the trusting and warm relationship between a psychotherapist and a child, emphasizing that the child should be treated as personality. His therapy was called “relationship therapy.”

Domestic psychologists also use art therapy and elaborate original methods. As a result of multi-year studies by foreign and domestic psychotherapists, the following art-therapeutic means of influencing children were identified: isotherapy, color therapy, sand therapy, phototherapy, play therapy, dance and movement therapy, music therapy, vocal therapy, fairy tale therapy, puppet therapy. According to O. M. Tadeusz, the main principles of art pedagogy are dramatization and theatricalization. The scientist emphasizes that theatrical activity cultivates students’ acting skills and contributes to creative and communicative abilities, attention, and endurance (Tadeush, 2020, p. 119).

Art pedagogy actively applies painting, photography, didactic games, music and, to a lesser extent, dance. Naturally, the purpose and tasks of art pedagogy are fundamentally different from ones of art therapy.

The central goal of art therapy is to correct the psycho-emotional state of a person who is experiencing emotional difficulties caused by stress, is dissatisfied with family relationships, and is subject to emotional rejection by other people, which leads to depression, emotional instability, impulsiveness of emotional reactions, feelings of loneliness, interpersonal conflicts, low self-esteem, and other states.

The goal of art pedagogy is to intensify the cognitive activity of students via art tools, develop creative imagination and emotional memory, harmonize the spiritual and moral state, the inner world of children and their socialization; to raise the child’s self-identification through immersion into national and world art, cultivate love for the value meanings of art and culture, folk traditions reflected in the

pieces of domestic painting, sculpture, music, literature, theater, choreography, material culture, and other creative activities.

One thing is certain: the above-mentioned functions of art and culture have a therapeutic effect on the growing child's personality, but the identification of peculiarities of the influence of each type and genre of art and culture on children with different individual psychophysical features is a matter of joint research efforts of representatives of related sciences: didactics, meta-methods (supra-subject sciences of a single methodological strategy in teaching, upbringing and development at the inter-subject level), pedagogical psychology, psychiatry, medicine, differential psychology, and psychology of art.

At the present stage of the development of art therapy, all the attention of researchers and educators is focused on observing the healing effect of art therapy exercises on children of different ages with different educational needs, especially preschool and primary school children. The use of art therapy is a way to restore harmony in the child's emotional world and train thinking and self-esteem. In other words, it helps the child to enter into the world of adults and the world of native nature and native art without conflict and feel the beauty and harmony of creative cognition of the surrounding reality. The most valuable thing in art therapy is to elaborate a structure of diagnostic criteria for identifying the problems of preschool children via art tools, which allow psychotherapists to effectively use art-therapeutic and artistic-aesthetic means to correct children's mental traumas and prepare them for entering an independent social life.

Art pedagogy is at the beginning of its journey, but it has a promising future. Its experience of working with children with special educational needs is highly valued. However, as in any educational process, artistic and aesthetic means of art therapy amidst the socialization of preschool children with special needs require the following from studies:

- 1) a clear understanding of the research problem;
- 2) a well-formulated goal setting (what does the researcher want to get as a result of his research activities?);
- 3) the researcher's readiness for in-depth psychological and pedagogical analytical activities of children amidst the personal-activity environment organized by the expert for children by means of art-pedagogical exercises and tasks;
- 4) classification of artistic and aesthetic exercises and tasks of art pedagogy for children with special educational needs;
- 5) the ability to observe the behavior of children in different situations of art pedagogy games and record their impact on the intellectual, emotional and volitional qualities of the child;
- 6) the ability to summarize the research findings at the theoretical and practical level.

Teachers and postgraduate and undergraduate students of art and culture institutions play a special role in studying the problems concerned. Solution is complicated by the fact that the use of various art forms to create a synchronous polyphonic system of art pedagogy's artistic-aesthetic game exercises for preschoolers with special educational needs holds researchers to have encyclopedic knowledge not only in art and culture but also in didactics, psychology of art, and interpretation methods adapted to the set research tasks. The difficulty lies in the fact that, when planning art pedagogy activities with children with special educational needs, it is necessary to take into account that researchers will deal with individual characteristics of children: some have language impairments, others have emotional "stiffness" and detachment from the team, and others have aggressive behavior, etc., caused by experienced psychological traumas or illnesses. The main goal is to create a trusting, communicative environment for all children and involve them in collective communicative and cognitive activities via art tools: painting, music, choreography, without losing sight of their effect on children and their reaction in order to further implement the didactic principle of an individual approach to each child,

given their behavioral specifics. On top of that, it is crucial to always keep in mind the wise words of S. A. Amonashvili: “Do no harm!”

**Results and discussion.** Long theoretical discussions and the practice of introducing art pedagogy into the educational space of Ukraine prove that education and upbringing via art tools solve many pedagogical problems, in particular, stimulate the learning abilities of students with special educational needs, harmonize their psycho-emotional state, and form their creative skills and the ability to work in non-standard situations, which is actualized in the modern world. Art pedagogy is aimed at improving the personal approach to students and, in this regard, can be a strategy for updating the educational process.

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## THEORY AND HISTORY OF CULTURE

DOI <https://doi.org/10.30525/2592-8813-2024-1-17>

### HARMONIZING TRADITIONS: CULTURAL SYNTHESIS THROUGH PIANO ADAPTATIONS OF CHINESE FOLK SONGS

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**Abstract.** The field of processing and arrangement of folk songs has been notably captivating for composers, as it unveils unexplored possibilities through piano, introducing new tonal expressions for well-known folk tunes. This research synthesizes methods from philosophy, cultural studies, history, and musicology. The dominant creative trend among Chinese composers is the adaptation and arrangement of their national art, diversifying the portrayal of musical content and promoting the global popularity of beloved national melodies. The works in arrangements, orchestrations, and transcriptions serve adaptive, enlightening, didactic, and concert functions in Chinese culture. The classification of these genres follows the European musicological tradition, as there is no precise definition in Chinese musicology. The analysis of piano arrangements reveals an inseparable connection to national musical traditions in terms of genre, form, tonality, timbre, and rhythm. The growing interest of European composers and performers in incorporating Chinese professional music genres opens avenues for studying new relationships and assimilating expressive elements of Chinese musical language within the European music context.

**Key words:** folk songs, adaptation, piano arrangements, cultural synthesis.

**Introduction.** Piano art is an integral part of Chinese culture and emerges as a late branch of world musical traditions. The formation of piano composer creativity began only at the beginning of the 20th century with the establishment of the Republic of China in 1912. Despite the fact that the first keyboard instrument, the clavichord, appeared in China as early as the 16th century, there was a long-held belief that the piano was only suitable for composing European music.

In the voluminous, multi-genre piano heritage of Chinese composers from the very beginning of its formation, special attention is drawn to the tendency to turn to national folklore and create compositions based on its material through treatments, arrangements, and transcriptions. The development of folklore samples turned out to be one of the most widely represented branches of the piano composer's heritage.

A real phenomenon of Chinese civilization, folk song, and instrumental creativity, which reflects the everyday life of people, their thoughts, customs, rites, the history of the country, heroic feats of the past, and the poetics of the beauty of natural landscapes, served as a source of inspiration for composers in finding themes for musical works and ways of embodying images and plots in creative practice.

Due to the achievement of the perfection of musical forms, the utilization of the wealth of sonorous-coloristic, dynamic, and textural possibilities of the piano, the renewal of the tonal-harmonic sphere in combination with the preservation of the peculiarities of the Chinese musical vocabulary, in many cases, the authors' treatments, arrangements, and transcriptions significantly exceed the artistic level of the originals.

Understanding Chinese piano creativity as a holistic phenomenon is impossible without studying the specificity and systematization of treatments, arrangements, and transcriptions in the creative works of Chinese composers.

**Main part.** The basis for the study of this issue was the scientific explorations, primarily conducted by Chinese researchers. This is explained, firstly, by the popularization of Chinese scientific thought and its introduction into the world scientific circulation. Secondly, it is justified by the development of scientific thought in China, reflecting an increase in the level from the position of musicology. The appeal to world studies mainly belongs to the group of studies devoted to the examination of code sublimation in cultural and artistic objects. The research conducted in the process of forming the goal and performing the research tasks can be conditionally divided into three groups: the main stages of the development of Chinese piano music of the 20th century, which included the works of Chinese researchers, namely Bian Meng (features of the periodization of Chinese piano art), Li Huanzhi (general characteristics of musical culture), Zhang Ming (study of the historical background for the formation of the piano-educational field ) Wang Changkuya (national specific features of musical culture); a complete picture of the genre diversity of piano art in modern China, which includes the works of Ei Han (the works of individual contemporary composers), Sun Weibo (polyphonic cycles), Li Xiaoxiao (piano miniatures), Pan Wei (study of sonata genres of piano culture).

According to the analysis of the literature, it can be noted that highlighting the specifics of treatments and arrangements in the work of Chinese composers forms **the purpose of this study**. In accordance with the purpose of the research, a number of tasks were formed, among which to carry out a cultural-artistic analysis of the musical art of China in the context of the traditions of national culture, as well as highlighting the specifics of treatments and arrangements in the work of Chinese composers.

**The methodological foundation** of the research is grounded in a synthesis of general scientific methods from philosophy, cultural studies, history, and musicology. The research methodology encompasses a range of methods, including historical-dialectical analysis to examine the dynamics of cultural-historical processes in the evolution of Chinese musical art. Cultural methods are employed to comprehend the dynamics of overarching cultural processes in Chinese piano art. Musicological methods are utilized for genre-style analysis of piano arrangements, compositions, and transcriptions in the works of Chinese composers, focusing on their developmental trends. Systematic methods are applied for the systematic categorization of typological features in the domain of treatments, arrangements, and transcriptions by Chinese composers. Chronological methods help in understanding the sequential relationship of events. Biographical methods are employed to explore the creative journeys of individual composers within the broader context of genre development. Lastly, theoretical generalization is employed to summarize the outcomes of the research.

Work in the field of arrangements and arrangements of folk songs extremely attracted and inspired composers, as they were presented with hitherto unknown horizons – the possibility of finding, using the capabilities of the piano, new timbre ways of presenting the musical material of well-known, beloved and widely performed folk songs. In connection with this, the problem arose of finding new means of artistic expression, and most importantly, musical styles that would correspond to the disclosure of the multifaceted and complex plots with their diverse characters and many situations. Through the assimilation of certain European musical styles, the possibility of musical filling with deep life and philosophical content of long and complicated song plots opened up.

Romanticism and impressionism had the most noticeable influence on the stylistics of Chinese composers. Romantic trends manifested themselves primarily in the increased interest in folklore material, in the programming of piano arrangements and arrangements of folk songs, in the individualization of images and increased attention to the sensual world, in the tendency to use forms (miniature preludes and program cycles, one-part concert pieces of the poetic type), as well as in the individualization of means of musical expressiveness. The tendency towards impressionistic means of musical expressiveness, the most consonant with the mentality of the Chinese, can be observed in many arrangements of folk songs, starting from the early author's works and throughout the

20th century and in ways of harmonic or textural presentation; this is also indicated by the subjects of many miniatures – landscape sketches, genre scenes, depictions of unreal fantastic images. In most of them, attention is drawn to the influence of the impressionistic technique, manifested, in particular, in the variety of the author's remarks about tempo changes, dynamic shades, and agogic instructions. Their composers write out in detail and offer the performers barely noticeable deviations from the main tempo or rhythm in order to achieve more precise nuances and artistic expressiveness in the creation of impressionistic pictures of nature. The influence of the aesthetics of romanticism and impressionism is also reflected in the choice of forms of arrangements – a small prelude, a concert piece, variations with variant development of the theme of the song (Barnard, 2000: 60–62).

In the arrangement of the Guangdong folk song “Thunder in the Dry Season” by Chen Pei Xun (1959), which is perceived as a small concert piece, we observe characteristic textural techniques – multi-planning, the use of light, as if “shadowed” passages flying through the upper layers), as well as sequences of harmonic combinations – unresolved dissonant consonances that are perceived as smears of blurred colors, an unexpected change of distant tonalities. The piece contains a large number of performance instructions: *leggiero*, *marcato*, *agitato*, *brillante*, *dolce*, *rallentando*, *toucher* (as a way of coloring the sound), etc. A characteristic feature of the arrangements of folk songs is the attempt to recreate the wealth of poetic pictures of Chinese nature, against the background of which various plots unfold, using the piano (Barnard, 2000: 65). At the same time, the nuances of literary stylistics are preserved. Wang Jianzhong's arrangement of the song “A Cloud Haunting the Moon” (1932) can serve as the earliest example of the reproduction of picturesque and symbolic pictures of nature by means of the piano, in which the composer convincingly demonstrates the method of achieving impressionistic color impressions and static dramaturgy.

The poetics of nature is often combined with pictures of historical events and heroic deeds that took place in the history of China. Many works are devoted to this topic. One of the most common historical songs is “Red flowers bloomed on the mountain”, recorded during one of the folklore expeditions in the Shaanxi-Hansu region (Byan' Men, 1996: 32). The song belongs to the “shan ge – son tian you” genre. Shan ge are peasant songs from the mountainous regions of China. Xing tian yō is the name of the three-part form A – B – A, characteristic of historical songs, in which the form and character of the performance of each section are clearly defined: “A” is performed very softly, lyrically, mournfully and widely; dramatic section “B” – very fast; the final “A” is an exact reprise of the first section.

The song “Red Flowers Bloomed on the Mountain” originated during the Sino-Japanese War and depicts the events of the heroic liberation campaign of the Red Army of China in 1934–1936, which ended in a painful but unconditional victory. It glorifies the historical exploits of the Chinese Red Army, which in continuous battles covered hundreds of thousands of kilometers, liberating the Chinese people everywhere from the invaders. During the liberation journey, the army had to cross the territory of 12 provinces, overcome 18 high mountain ranges and ford 24 large rivers and many viscous swamps (Byan' Men, 1996: 38). In the autumn of 1936, in the course of fierce fighting, the troops of the Chinese Red Army managed to break into the Shaanxi-Hansu region, where its campaign ended victoriously, and the war itself ended. Before taking the last line, the fighters “saw a mountain strewn with red solemnly blooming poppies, which joyfully seemed to foretell victory” (the quote is from the text of the song). This song was arranged by Wang Jianzhong (1974). Before presenting the author's text, the composer provides a digital version of her recording with subtitles and a deciphered text of the melody. Wang Jianzhong's arrangement is an unparalleled example of the reproduction of a picture of nature, against the background of which recent but very difficult historical events ended.

According to Chinese aesthetics, the depiction of paintings of blooming nature always has an important symbolic meaning. Blooming poppies witnessed the heroism of Chinese soldiers and seemed to predict the victorious end of the struggle of the enslaved people. The composer, deeply

understanding the meaning of the song's text, concentrates his attention not on the detailed reproduction of the historical events themselves, the sufferings of the people and the final victory. His task was to reproduce not the very picture of nature and heroic deeds, but the feeling of the people's faith in victory after seeing the riot of blooming poppies. The interpretation of the blooming of different flowers and their colors in Chinese culture always has a symbolic meaning when creating certain characters of people or events (Li Tsziti, 2004, 265). For example, red poppies symbolize victory, fearlessness, a sense of hope; bamboo – resistance to strong winds, stability and strength of the character, flexibility of his character and great self-sacrifice; chrysanthemums are a symbol of solitude; plum blossoms are a symbol of stability, inviolability, purity and nobility.

The arrangement of the song “Red flowers bloomed on the mountain”, turning into a romantic piece, became for the composer (with the absolute preservation of the folk melody) a way of philosophical understanding of the poetics and symbolism of a specific picture of nature. He achieves this by means of texture and harmonious coloring (Li Tsziti, 2004, 220). When comprehending the intonation features of the literary basis of the folk song and the philosophical reproduction of nature paintings, Liu Feng synthesizes romantic and impressionistic writing techniques. Impressionist features are revealed in the arrangement in the weakening of functional harmonic connections, which creates the effect of static; in the method of repeatedly using repetitions of the same intonation, which acquire the importance of the most important element in the creation of a form, and at the same time are one of the characteristic features of the impressionist prelude genre. Among other stylistic devices that indicate a tendency towards impressionistic techniques – the “scattering” of the climax of the work, which is often achieved by means of fading dynamics during the upward movement of the melodic line; veiling of harmonious coloristics; the use of a textured approach involving the extreme registers of the piano and a very light, contoured filling of the middle register; the great importance of the pedal, the function of which is to combine several textured layers; the richness of the use of soft ink as a special way of touch and the force of pressing the keys. According to the method of elaboration of a traditional melody (preserving the form of the original and basing on the originally given compositional structure), this work belongs to the genre of arrangements (Byan' Men, 1996: 56). This work also serves as an example of the trend developed in the work of Chinese composers to achieve a connection between Chinese national songwriting and European instrumental compositions of the “music for listening” type.

A typical feature in the practice of Chinese composers is the trend towards piano processing of songs from different provinces. Among the most performed and most revealing examples are Wang Lishan's arrangement of the popular Shanxi folk song “Lanhuahua” (1947); Ding Shande's “Dances of Xinjiang” (1950) and “Variations on the Themes of Chinese Folk Songs” (1948), which were based on the themes of the songs of the peoples of Tibet; Zhu Peibing's arrangement of Hebei folk song “Jasmine” (1952); “Piano Translations of Folk Songs of Shanxi Province” by Zhou Guan Zhen (1953); arrangement of the song “Thunder in the Dry Season” by Chen Pei Xun (1959), which uses the themes of Guangdong folk songs and “Autumn Moon over the Quiet Lake” (1975) – based on songs from Zhejiang province about the picturesque nature of its rural areas, etc. When arranging and processing folk songs of different provinces, composers often combined them into cycles. These include “Blue Flower” by Wang Lishan (1947), “Seven Pieces on the Themes of Mongolian Folk Melodies” by San Ton (1952)<sup>37</sup>. The cycle included arrangements of folk songs from the northern region of China – Inner Mongolia. Thanks to the subtle and expressive reincarnation of national musical features, the cycle was named “Wreath of Semi-Mongolian Flowers”.

For the creation of arrangements and the possibility of reproducing the interweaving of plot lines in them, composers mostly chose the cyclical form of the variation cycle. This quickly took root in practice and became a tradition. The choice of the variation form was determined primarily by the literary basis of folk songs, many of which have a long unfolding plot that develops very slowly. The



variational form corresponded to the intention of the composers to reveal it in a number of individual variations, similar to individual episodes in the lives of the main characters. In the theme, the image and character of the main character was usually reproduced, in variations – stages and events from his life, and in the finale, a summary of the development of the plot was summarized with a pronounced philosophical conclusion (Byan' Men, 1996: 101). An example of such variation cycles can be the arrangement of the song “Blue Flower” by Wang Lisan (1947), created on the basis of a favorite ancient Chinese plot. Wang Lisan is the author of works of various genres, among which a significant place is occupied by piano arrangements of melodies of folk songs and dances. Among the works of Chinese composers, his arrangements are among the most famous and popular. The song “Blue Flower” tells about the fate of a beautiful girl with the poetic name Xintianyu (translated as Blue Flower) (Li Tsziti, 2004: 23).

She was considered the most beautiful and smartest in the entire Celestial Empire, but in the conditions of feudal lawlessness and the laws of her village about the undisputed fulfillment of the requirements of the will of her parents, she had to marry an ugly grandfather who looked like a “monkey and a grave”. Xintianyu did not submit to her fate and, wanting to change it, decided to fight against feudal dogmas, go against the will of her parents and find her own happiness, but during a long and exhausting struggle, she died. Wang Lishan's piano arrangement is based on one of the versions of the Northern Shaanxi folk song (shan ge) “Xintianyu”, which is one of the most widespread and beloved in Shaanxi province (located in the center of China, far from the sea, in the middle course of the Yellow River). In the compositional aspect, the quality and professionalism of Wang Lishan's piano arrangement of the song “Blue Flower” played a decisive role in the process of its further popularization among performers, as well as among listeners – residents of China, who very slowly accepted the performance of their favorite traditional melodies on a foreign instrument.

This work is important in other aspects as well: in the use in the arrangements for this kind of traditional songs of the form of variations, in which the composer reveals his own fantasy in the reproduction of the event plot; the performer's ability to perform a perfect interpretation, to vividly reproduce the pictoriality of the sound recording, which visualizes the unfolding of the vicissitudes of the song text by means of the piano. Among the cycles of arrangements of traditional songs and instrumental melodies, Zhu Peibing's “24 Pieces on the Theme of Chinese Folk Melodies” (1991) stands out, which included arrangements of songs from various provinces: Hebei (the songs “Little Shepherd”, “Jasmine”), Yunnan (“Song about the drovers”, “The river flows”), Shanxi (“Sophora”, “Blue flower”), Sichuan (“Happy sunrise”, wedding song “Embroidered bag”, “Rocking chair”), Jiangsu (“The nature of Wusi”, “Willow”), the Northeast (“Feast of Lanterns”, “Western Gate”, “Mount Yange”) and others. The song “Cabbage Leaves”, which tells about the plight of a girl who lost her mother, is very popular in several provinces: Shanxi, Hebei and Inner Mongolia.

Most often, composers chose songs from their native province for their own arrangements. However, there are a number of examples of addressing the same song by several composers born in different provinces. Of course, this is explained by the special beauty of the melody and the popularity of a particular folk song among the various nationalities of China. Such examples can be, for example, the song “Jasmine”, arranged by Zheng Lu, Xu Zhipin and Zhu Peibin; “Bamboo Flute Melody” – Bao Yuankai and Zhao Jiping; “Butterfly in love with flowers” – Zhu Peibin and Liu Tian Hua, “Blue flower” – Wang Lishan, Zhang Xiaolu and Zhu Peibin) and others.

The folk song “Flowing River” (1991) from the cycle “24 compositions on the theme of Chinese folk melodies” by Zhu Peibing is widely used in the territory of Midu County (Yunnan Province) and is a vivid example of peasant songs. Thanks to the composer's picturesque piano arrangement, not only the song itself has become very popular throughout China, but also a piano piece that ranks first among the most loved and performed. In the text of the song, the following scene is very picturesquely and poetically subtly depicted: in complete silence, where only the gurgling of the

stream can be heard, a young girl admires the silver moon, the night landscape and tells nature about her sad love for a young boy. Zhu Peibing's arrangement of the folk song "The Flowing River" vividly testifies to the stylistic features of the piano works of Chinese composers characteristic of this genre. Here we do not mean the use of attributes typical for Chinese traditional music (pentatonics, odd strophic structure, reproduction of a state of reflection against the background of nature), but broader concepts – programming and correlation of poetic features (as a synthesis of poetic and musical arts) with romantic aesthetics. On the example of this work, we can also see an appeal to impressionistic sound-imaging techniques, when by means of sound recording on the piano (rhythm, "flightiness" of passages, the use of second-quarter constructions of altered chords, like strokes of paint), the impression is reproduced not only of the night landscape, but also of a subtle psychological image of a girl in love. Zhu Peibing's work is created in the form of variations, in which the composer reveals his own imagination in reproducing the event plot of the plot. The performer needs to achieve the ability to perform a perfect interpretation, as well as a bright pictorial sound recording that visualizes the unfolding of the song's plot vicissitudes.

Yang Jia San especially turned to the arrangements of Hebei folk songs. In the cycle "Folk Songs of Hebei Province" (1991), the composer, preserving the abundant melismatics of the traditional melodies of the province and too frequent metrorhythmic and tempo changes, very subtly reproduces the specifics of the color of rural nature and the emotions of joy from work. The arrangement of city songs ("xiao diao") is another, but no less important area of Chinese composer creativity. Similar to European romantic music, arrangements of urban songs can be compared to short preludes, which embody one, sometimes very laconic, but vivid musical image. An example of this is Bao Yuankai's translation of the wedding song "Embroidering a Hanging Purse" for symphony orchestra (1991). The work immediately gained immense popularity not only among the Chinese population. Contemporary German pianist Alexander Bildau, who is considered one of the best interpreters of romantic music, translated several of Bao Yuankai's particularly picturesque symphonic compositions for the piano. Wanting to make the song "Embroidery Hanging Purse" even more accessible to listen to, Bildau's example inspired Zhu Peibing (Bao Yuankai's composition teacher) to make a piano arrangement (2007) of its symphonic version. Since then, this play, which began to be played constantly on the concert stage, gained even more popularity.

In the expansive realm of piano adaptations based on national song material, it is noteworthy to highlight the considerable focus bestowed by Chinese composers upon patriotic songs. The 20th century witnessed a distinctive evolution of patriotic songs in China, particularly following the historic National Movement initiated by Beijing students on May 4, 1919. This movement marked a pivotal turning point, instigating fervent efforts for China's independence and resistance against imperialist forces. The subsequent surge of patriotic fervor profoundly influenced the musical landscape, leading to a specialized development of patriotic songs within the context of piano arrangements. The revolutionary movement quickly covered the territory of the entire country, and the Chinese proletariat became a new great force on the world stage. Mao Zedong announced the beginning of the national liberation and anti-imperialist struggle of the Chinese people and refuted the legend of "sleeping China" in front of the whole world. The legend was spread all over the world by the famous saying of Napoleon: "Let China sleep! When he wakes up, the world will be amazed" (Li Tsziti, 2004: 43). Among the first best songs "Let us not forget the twenty-fifth year" and "March of the Salvation of the Motherland" by Xian Xinghai, his cantata "Huanghe" (created from the materials of patriotic chants about the history of the centuries-old struggle of the Chinese people against foreign invaders) for a male choir, soloists, a reader and an orchestra of folk instruments. Among the most popular songs by other composers are "March of the Volunteers" by Nie Er, which became the national anthem of the People's Republic of China, "The Drum Beats the Alarm" by Zhang Shu, "Song of the Fishermen" by Zhen Huang, "March of the Eighth Army"

by Zheng Lizhang, “Transition to a New Era” by Wang Jian Zhong, “The Song of Changbaishan Mountain” by Zheng Zhenyu and others.

During the years of the Cultural Revolution, the piano arrangements of the best patriotic songs, created both in ancient times and in today's conditions, received special development unexpectedly, but logically. Thanks to these arrangements, the revolutionary-victorious character and figurative structure of which particularly corresponded to the spirit of the time, the piano managed to remain on the instrumental horizon of China. Individual works with the participation of the piano of just such an ideological direction: elevating the patriotic and revolutionary sentiments of the people, glorifying the heroic deeds of the past and present, praising and glorifying the ideas of the Communist Party and its leader, were the only ones allowed in this period. During the years of the Cultural Revolution in the genre of piano arrangements.

All composers who remained among the few allowed by party government officials worked on patriotic songs. The work of one of China's most famous composers, Wang Jianzhong, “Embroidery of Letters on a Banner with Gold Threads” (1974) was recognized as one of the best. Among the most revealing in the genre of work with patriotic songs, we should note two other works – piano arrangements of the songs “Being a Man Like Him” by Yin Chenzong (1976) and “Lake Honghu” by Han Minxiao (1977). The material for both arrangements was songs from traditional national operas.

**Conclusions.** Turning to arrangements and arrangements of folk songs in the piano music of Chinese composers is seen as a dominant creative tendency, manifested in the great attachment of Chinese composers to their national art; in the ways of diversifying the transfer of the figurative content of the works and their performance, strengthening the popularization of favorite national melodies in China and the world, understanding the expressive possibilities of the piano and faster introduction of it into the cultural space of China. It was revealed that works in the genres of arrangements, arrangements and transcriptions performed adaptive, educational, didactic and concert functions in Chinese culture. Attempts to systematize genres derived from the original source in the writings of Chinese researchers are studied. Since there is still no clear definition of treatments, arrangements and transcriptions in Chinese musicology, they are systematized according to the genre division of European musicology. The analysis of piano works, arrangements and Chinese composers made it possible to reveal an inseparable connection with national musical traditions in the aspects of genre, form-creating, mode, timbre and metrorhythmic thinking. The increased interest of European composers and performers in embodying the patterns of professional musical genres of China is noted, which opens up prospects for studying a new type of connections – the interaction of different types of musical thinking and the assimilation of expressive means of the Chinese musical language in the genre context of European music.

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## THEORY AND INNOVATIONS OF SOCIOLOGY

DOI <https://doi.org/10.30525/2592-8813-2024-1-18>

### SCIENTIFIC AND THEORETICAL ANALYSIS OF THE FORMATION OF SOCIOCOMMUNICATIVE COMPETENCE OF FUTURE SPECIALISTS IN THE SOCIAL SPHERE

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**Abstract.** The article examines the role of socio-communicative competence for future specialists in the social sphere. It was found that in today's fast-paced world, a highly skilled professional must possess effective communication skills in order to navigate the complexities of human interactions, promote positive social change, and provide ethical and culturally competent services. It is noted that researchers consider this competence as the ability to express oneself clearly, recognize signals in context and adapt to the needs of the interlocutor. It has been found that it includes building partnerships and solving problems through effective communication. The main, in our opinion, scientific and theoretical principles and approaches to the formation of socio-communicative competence (interdisciplinary approach, practical orientation, problem-based learning, cultural competence, etc.) have been considered. The research emphasized the importance of social ethics. Attention is focused on the important place of information and communication technologies in the process of formation of socio-communicative competence.

**Key words:** socio-communicative competence, information and communication technologies, interdisciplinary approach, social ethics, practical orientation.

**Introduction.** In the 21st century, we are constantly faced with various changes in all aspects of social life, which require a quick reaction and adaptation to the socio-cultural realities of a fast-moving world.

As our society struggles with a vast variety of complex social challenges, from cultural diversity issues to global health crises and persistent social inequality, the role of future social professionals and their ability to communicate and interact effectively with diverse people and communities becomes of primary importance. The effectiveness of their intervention and the impact of their work depend not only on their experience and comprehensive theoretical knowledge, but equally on their possession of socio-communicative competence, which equips them with the necessary skills and principles to navigate social dynamics, ethics and the complexities of interactions between people. This not only increases their effectiveness in meeting the unique needs of individuals and communities, but also contributes to the achievement of the broader goal of creating a socially just and inclusive society.

The main aspects and principles of the formation of socio-communicative competence as an important component of professional readiness and awareness of specialists have gained popularity among domestic scientists. It is worth mentioning the works of M. Aizenbart (2017), N. Barabanova (2018), D. Hodlevska (2007), V. Petruk (2021), S. Kalush (2008), I. Mishchenko (2019), O. Moskalenko (2017), A. Stopkina ta I. Trubnyk (2021), E. Sadovska ta A. Yaroshenko (2018), O. Tymofieieva (2016), T. Shevchuk ta S. Khliestova (2020), V. Kyrychuk (2014).

The idea of the necessary integration of information and communication technologies during the formation of socio-communicative competence is revealed in works of O. Pluzhnyk (2022), S. Kachmarchyk (2017), O. Kravets ta N. Samborska (2019), L. Ditkovska (2013).



The role of an interdisciplinary approach in the process of forming socio-communicative competence is noted in the studies of E. Sadovska and A. Yaroshenko (2018), V. Petruk (2021).

Ethical and moral principles attracted the attention of such scientists as E. Sadovska and A. Yaroshenko (2018), S. Kalush (2008), V. Petruk (2021), A. Kapska (2003), L. Tiuptia ta I. Ivanova (2008).

**The purpose of our research** is to determine the role of socio-communicative competence of social sphere specialists in the modern world and to analyze the main scientific and theoretical principles and approaches to the formation of this competence.

**Main part.** In an age marked by information overload, rapid technological advances, and a growing emphasis on inclusivity, the ability to communicate with cultural sensitivity, empathy, ethical awareness, and technological savvy is essential. Further research on socio-communicative competence will shed light on its importance as an enabling force that motivates future social professionals to make meaningful and sustainable contributions to the improvement of society.

The research methods we used in the process of writing the article are the analysis of scientific literature, systematization, generalization, deduction, synthesis, comparison, observation.

First of all, it is necessary to analyse the definition of the concept of socio-communicative competence in the scientific literature. Some scientists interpret socio-communicative competence as a specialist's ability to effectively communicate and use their professional and personal experience of interacting with people in various social situations. Future specialists in the social sphere must not only express themselves clearly, but also recognize verbal and non-verbal signals in social contexts, adapt to the situation, needs or wishes of the interlocutor (Aizenbart, 2017: 3; Tymofieieva, 2016: 173).

V. Kyrychuk considers socio-communicative competence as the ability of a specialist to realize their own tasks, goals and needs, to solve problematic or difficult situations by creating partnership relationships with interlocutors or clients in accordance with their needs, requests, goals and expectations within the limits of universal, tolerant and acceptable rules of behavior and thanks to effective communication (Kyrychuk, 2014: 75).

According to S. Kalush, socio-communicative competence is a set of certain skills, knowledge, personality qualities needed for the social-professional sphere. This competence means the ability of people to interact and communicate effectively in a social environment. It covers a combination of linguistic, pragmatic, cultural and emotional competences that allow people to navigate successfully in various social situations.

Key components of socio-communicative competence:

- communicative component (verbal and non-verbal communication skills);
- conceptual component (knowledge of professional activity);
- cultural component (understanding and respect for different cultures, communication in different social conditions);
- empathy and emotional intelligence (understanding one's own emotions and managing them, as well as being sensitive to the emotions of others) (Kalush, 2008: 11–12).

It should be noted that the formation of socio-communicative competence is based on certain scientific and theoretical principles and approaches. In our research, we want to pay special attention to the main principles that play the most important role in the formation of the above-mentioned competence, namely:

- interdisciplinary approach; integration of knowledge, skills and abilities from different fields;
- practical orientation;
- use of active methods, problem-based and experimental learning;
- the importance of cultural competence;
- following ethical and moral principles;
- social constructivism;

- the need for social interaction;
- integration of information and communication technologies.

Having analyzed a number of scientific works and sources related to these principles, we aim to share the main results of our research.

Firstly, it is worth noting that the social sphere has an interdisciplinary nature, and therefore educational programs must integrate knowledge, skills and abilities from various fields, namely: psychology, sociology, cultural studies, intercultural communication, economics, management theory, pedagogy, medicine, legal studies, etc., in order to provide a deep and holistic understanding of social dynamics, as well as to expand their views on social problems, develop critical thinking and flexibility (Sadovska and Yaroshenko, 2018: 37–39; Petruk, 2021: 47).

The ability to adapt to different cultures, understanding intercultural differences and the ability to effectively interact with different sociocultural groups based on knowledge of one's own culture and the culture of the interlocutor is an important element of socio-communicative competence. In this context, it is necessary to note the role of cultural competence (Kalush, 2008: 8–9).

The next important principle of forming socio-communicative competence is practical orientation and the use of an active approach. Providing real-world experience through internships, case studies and simulations allows future professionals to apply theoretical knowledge in practical social contexts. Role playing and exercises can simulate real social scenarios, allowing people to experience their strengths and weaknesses, practice and improve their communication skills in a controlled environment (Hodlevska, 2007: 15).

A. Styopkina and I. Trubnyk believe that by applying experimental and problematic techniques and methods, it becomes possible to create those scenarios that future specialists may encounter in their professional field in the future. They also emphasize the importance of working with real clients and analyzing real cases (Styopkina and Trubnyk, 2021: 249–251).

I. Mishchenko also emphasizes the effectiveness of the formation of socio-communicative competence with the help of a problem-based approach, because it contributes to the activation of social interaction. According to the scientist, this approach develops searching creative skills, teaches to find and solve potentially real problems in the future, create hypotheses of solutions, evaluate the correctness of solutions (Mishchenko, 2019: 130–132).

Such scientists as E. Sadovska and A. Yaroshenko also support the opinion on the effectiveness of problem-based learning and the use of active learning methods. Moreover, they note the importance of trainings and webinars for improving the competence of specialists and their understanding of the content of problematic situations from their own point of view and the position of other interlocutors. By critically analyzing simulations of potential professional situations, the future specialist learns to evaluate their strengths and weaknesses, the effectiveness of their actions, potential, and action plan in a particular situation (Sadovska and Yaroshenko, 2018: 45).

Solving problem situations should take place in the form of a monologue, dialogue, group discussion. Since the main task of specialists in the social sphere is interaction between subjects, the use of dialogic methods and group discussion is extremely important in the process of forming socio-communicative competence. This form of education will make it possible to establish mutual understanding, develop interpersonal skills and abilities, and will also be useful for solving conflict situations in work in the social field (Styopkina and Trubnyk, 2021: 252).

Social constructivism is another principle of effective formation of socio-communicative competence, because it emphasizes the importance of social interactions in the learning process. It assumes that people acquire social-communicative competence through active interaction with others, exchange of experiences and joint learning. This approach emphasizes the role of social contexts in the formation of communication skills.

Scientists pay special attention to the importance of ethical and moral principles in the social sphere. A professional in the field of social work must have a high level of professional qualifications, social culture and ethics. Since social workers represent a professional group "person-person", ethics and culture of communication, a high level of communicative competence, which is formed during interaction and is the result of communication experience between people, are important for them.

After analyzing various sources of literature, we can highlight the main ethical and moral principles (Kalush, 2008: 9; Petruk, 2021: 48–49; Kapska, 2003: 7–9; Tiuption ta Ivanova, 2008: 76; Sydorenko, 2006: 143–144; Mazokha, 2018: 87–89).

1. *Emotionally positive attitude, optimism and empathy.* A specialist in the social sphere must be able to listen, possess compassion, delicacy, reflection, friendliness and understanding, appreciate the emotions and needs of others, because this provides a favorable psychological climate and a greater likelihood of mutual understanding and successful resolution of problem situations.

2. *Understanding professional boundaries.* Future specialists in the social sphere must be aware of the limits of their roles, adhere to the confidentiality of information, fairness, objectivity, show respect and avoid conflicts of interest.

3. *Human spiritual values and norms of behavior.* Scientists claim that a social worker should possess such traits and values as honesty, tact, decency, benevolence, respect, self-control, responsibility, inner energy, openness, justice, attentiveness, tolerance, endurance, restraint, etc. Future specialists must inspire trust, respect and confidence.

4. *Humanistic orientation.* According to A. Kapska, the humanistic orientation should be understood as a set of certain value orientations and attitudes in the process of communication, the purpose of which is an educated, tolerant, attentive and tactful attitude towards people, taking into account their interests, values and desires (Kapska, 2003: 7–9).

5. *Protection of social justice and social responsibility.* Future professionals must be aware of problematic aspects, power dynamics in society, and use their communication skills to advocate for justice and the well-being of marginalized or vulnerable populations. They must understand their role in making a positive contribution to society by using their communication skills to solve social problems and promote positive change.

6. *Conflict resolution and mediation.* Possession of knowledge and skills of professional communication and the ability to adequately apply them in accordance with the field and situation in order to solve problematic situations. Ethical communication involves respecting conflicts, finding solutions through dialogue, and avoiding harmful communication strategies.

7. *Reflective practice.* Future professionals should regularly reflect on their communication practices, taking into account the ethical implications of their interactions and constantly striving for improvement. In this case, E. Sadovska and A. Yaroshenko note the effectiveness of trainings, exercises and webinars on the topic of confidence, effective communication, social ethics, etc. (Sadovska and Yaroshenko, 2018: 37).

8. *Respect for diversity.* Future professionals must be prepared for diverse perspectives, cultures, and identities. It is important to appreciate the differences between people and communities, avoid stereotypes and prejudices, understand each other in inclusive communication, be tactful and tolerant.

9. *Client autonomy.* Future professionals must involve clients in decision-making processes, allowing them to express their preferences and choices when interacting with social professionals.

By integrating these ethical and moral principles into the formation of social-communicative competence, future professionals in the social sphere can develop a solid foundation for ethical, responsible and empathetic communication in their professional sphere.

Having analyzed a number of literary sources, we can state that in the modern world the use of information and communication technologies is absolutely necessary, and the social sphere is

no exception. These technologies offer unique opportunities to enhance learning, collaboration, and practical experiences.

In the information society, the social area requires the skills and knowledge of fast search, processing, presentation and transmission of data using computer networks. According to L. Ditkovska, raising the level of information literacy, ensuring access to information and communication technologies, awareness of the possibility of using these technologies contribute to the process of informatization of the social field. The above-mentioned technologies can be used to maintain documentation, perform various tasks, support and consult clients (Ditkovska, 2013: 79).

The competence of a social worker in the use of information and communication technologies should be understood as the ability of a specialist to use these technologies (programs, spreadsheets, networks, databases, etc.) to solve professional tasks and satisfy personal needs (Kravets and Samborska, 2019: 148).

Below are several ways in which information and communication technologies contribute to the development of social and communicative competence (Kachmarchyk, 2017: 110–115; Kravets ta Samborska, 2019: 148-150; Sadovska ta Yaroshenko, 2018: 37; Levus, 2011: 180–189; Pluzhnyk, 2022: 275-278; Sydorenko, 2006: 143; Popov, 2016: 36).

1. *Digital literacy and access to information.* Communication technologies provide future specialists with access to huge amounts of information, contributing to the development of digital literacy. Learning to navigate online resources allows them to stay abreast of social issues, research findings, and practice developments in the field.

2. *Online collaboration and networking.* Social platforms, professional networks, and collaboration tools allow future professionals to connect with peers, professionals, and experts from a variety of professions. Online collaboration improves their ability to work effectively in multidisciplinary teams, contributing to a broader understanding of societal issues.

3. *Virtual learning environments, professional development.* Virtual learning environments facilitate flexible and accessible learning. Communication technologies offer many online resources for professional development. Future professionals can attend webinars, online workshops, and virtual conferences to stay up-to-date on industry trends, best practices, and new research in the social field. Future professionals can engage in interactive online platforms to develop their socio-communicative competence by participating in discussions, group projects and collaborative activities.

4. *Simulation and role play.* Communication technologies allow creating virtual simulations and scenarios of role-playing games. Future professionals can practice and improve their communication skills in a realistic digital environment, preparing for the different social contexts they may encounter in their professional activities.

5. *Telehealth care and teleconsultation.* For those involved in social work and counseling, telehealth technologies provide the ability to communicate with clients remotely. Future professionals can learn to adapt their communication styles to virtual environments, taking into account ethical considerations and ensuring effective customer engagement.

6. *Mobile communication and field work support.* Mobile technologies support communication in the field, allowing future professionals to stay connected while conducting research, interacting with communities, or participating in social interventions. Mobile apps and tools can increase efficiency and responsiveness in dynamic social environments.

7. *Involvement of social media.* Social media platforms provide a space for future professionals to engage in public discourse, exchange ideas, and connect with communities. Understanding the ethical use of social media helps develop a professional online presence and effective digital communication.

8. *Intercultural communication.* Virtual communication technologies facilitate interaction with people from different cultural backgrounds. Future professionals can participate in intercultural communication, expanding their cultural competence and preparing for diverse social contexts.



The implementation of communication technologies in the education and training of future specialists in the social sphere allows for a more dynamic, interactive and connected learning experience. It prepares them to navigate the changing landscape of communication in the digital age, while developing the social and communicative competence necessary for effective and ethical practice.

**Conclusions.** In general, we can conclude that the possession of socio-communicative competence by future specialists in the social sphere is extremely important in the modern society, which is constantly developing and changing. Socio-communicative competence can be interpreted as the ability of people to participate effectively and appropriately in social interactions, demonstrating verbal and non-verbal communication skills, cultural sensitivity and the ability to navigate different social contexts with clarity and understanding.

Having analyzed the main scientific and theoretical principles and approaches to the formation of the specified competence, we can highlight the importance of an interdisciplinary approach, practical orientation (problematic and experimental learning, active learning methods, simulation of potential professional situations), cultural competence, following ethical and moral principles (emotional and positive attitude, empathy, social responsibility, humanistic orientation, tolerance, understanding of professional boundaries and universal norms of behavior, client autonomy, respect for diversity, etc.), use of information and communication technologies (digital literacy, access to information, virtual professional development, online cooperation, teleconsultation, intercultural communication, involvement of social media, simulation of potential professional scenarios).

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DOI <https://doi.org/10.30525/2592-8813-2024-1-19>

## THE DYNAMICS OF THE HAPPINESS INDICATOR DEPENDING ON A PERSON'S AGE AND SELF-DEVELOPMENT

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**Abstract.** The expediency of conducting research on the indicator of people's happiness is obvious, because the scientific substantiation of this issue allows you to significantly influence the quality of life. The placebo effect has been scientifically proven to heal patients without medication, and people's awareness and acceptance of the prerequisites that increase the happiness index will certainly lead to positive changes in this direction. In the article, we try to determine the possibilities of maintaining a sense of happiness at every stage of a person's life, provided that he develops himself, self-learns in order to increase emotional intelligence and spiritual growth.

**Key words:** happiness, emotional intelligence, age changes, self-development, self-learning, awareness, harmony.

**Introduction.** A person's life is determined by his level of awareness and a harmonious combination of personal, social and public duties and goals. Actually, when we talk about the indicator of happiness, we mean subjective well-being (a more scientific term for happiness) – a combined value formed by feelings of satisfaction, protection, interest and trust in the surrounding world.

In turn, each of these states is determined by a competent assessment of one's potential and one's role in the social groups with which the individual is in contact. Happiness should be the natural state of a person, because he constantly strives for it, however, he is far from always in it, it is even possible to state that the state of happiness is rather short-lived.

If a person compares his expectations with the real situation, and, at the same time, objectively evaluates the situation, it means that he produces his own effective state and increases the happiness index in the future. If a person with age does not devote time and attention to internal development, is prone to depressive states, does not have his own moral and spiritual core – therefore, the dynamics of the happiness indicator is negative, falling.

So, the subjective nature of happiness, the dependence on the personal development of a person, makes the state of happiness difficult to define, and also makes it difficult to measure. However, in the psychological and sociological sciences there is a whole direction that studies the state of happiness and forms the basis for further research.

**Main part.** The ancient Greek philosopher Aristippus claimed that happiness is hedonically determined (Lysechko, 2020). Hedonic pleasure from the point of view of psychology is a state in which

a person feels relaxed, able to distance himself from his problems. In turn, neuroscientists studied the hedonic patterns of the human brain and concluded that pleasure is an important component of happiness.

In everyday life, this manifests itself, for example, in the ability of an individual to give up the so-called "prestigious" and profitable types of activities and professions for the sake of his beloved ones, "for the soul." Such a human choice is the result of the work of the brain, and also the result of the work of the brain, as neuroscientists have discovered, is pleasure, and therefore the feeling of happiness.

A logical question immediately arises: if a person does not have the opportunity to refuse a profitable job, can he be happy? Yes, but for this you need to adjust to the feeling of gratitude for everything else that this person has, neuroscientists recommend. Feeling grateful stimulates the production of the neurotransmitter dopamine, just like the antidepressant bupropion.

"One of the main effects of gratitude is an increase in serotonin levels. When you think about what you are grateful for, you focus on the positive aspects of life. This simple action increases the production of serotonin in the anterior cingulate cortex of the brain" (Kosynska, 2017). Thus, a logical chain arises – if we study our own feelings, analyze our internal states, and strive to influence the prevalence of positive emotions, then we get the opportunity to feel happy more often. That is, the repetition and duration of the state of happiness is the result of efforts and internal psychological work.

Let's turn to the results of the survey conducted by the Kyiv International Institute of Sociology. In December 2016, 54% of Ukrainian residents felt happy or rather happy, 25% felt partly happy, partly not, and 19% – unhappy or rather not happy. For our research, it will be appropriate to analyze the above figures and get answers about changes in the happiness index depending on age and other external and internal factors

The statistics of the study conducted by the Kyiv International Institute of Sociology show the dependence of the feeling of happiness on the socio-demographic aspects of life, including the social environment. The Institute conducted an all-Ukrainian public opinion survey using the personal interview method of 2,040 respondents living in 110 settlements in all regions of Ukraine (except the Autonomous Republic of Crimea). according to a 4-stage stochastic sample with quota selection at the last stage, which is representative of the population of Ukraine aged 18 and over. The statistical sampling error (with a probability of 0.95 and a design effect of 1.5) does not exceed: 3.3% – for indicators close to 50%, 2.8% – for indicators close to 25%, 2.0% – for indicators close to 10%, 1.4% – for indicators close to 5%. From the results of this study, we can see that, firstly, young people are much happier than older people. So, in December 2016, 74% of young people aged 18–29 felt happy, 59% of people aged 30–39, 51% of those aged 40–49, 48% of 50–59-year-olds, 60–69 years old – 44%, over 70 years old – 38% (Novikova, 2016).

Unfortunately, as we can see, as people age, the likelihood that they will feel less happy increases in direct proportion. The connection with age is largely determined by the state of health – older people often begin to get chronically ill, and, as research confirms, the state of health has a significant impact on the subjective feeling of well-being – that is, on the state of happiness.

Happy exceptions to this rule are those people who keep their consciousness in a state of happiness as they age, making maximum efforts to control and raise their spiritual, energetic and moral level. In this perspective, we consider it appropriate to focus attention on another statement that appeared as a result of a study by the Kyiv International Institute of Sociology: residents of the eastern regions of Ukraine are less happy: in December 2016, 59% felt happy in the western regions, 50% in the central ones, in the southern regions – 60%, while in the East of the country – 44% (Novikova, 2016).

We can assume that this is directly related to people's spirituality. After all, a long-term state of happiness is based on a person's feeling of its positive influence, a positive role in the life of its environment, family, region, and world. The sincere faith of people, their constant communication with



God, the desire for spiritual improvement leads to inner purification, to elevation, and therefore to a feeling of happiness.

Another thinker Pavlo Florenskyi at the beginning of the 20th century. said: "Man did not appear in the biosphere by chance, he has a huge task and huge, extremely complex duties to other people, to himself, and in general to the entire world landscape. It should work in the direction of some deeply positive transformation of this world. In the direction of reducing at least the evil in this world. And in the future, in general, to the necessary eradication of evil from space" (Zilghalov, Isychenko, Skurativskyj, 2005). Probably, here we can talk about the search for the meaning of life, as a component of the conscious and happy existence of a person.

Now we are faced with total mechanization, incessant multiplication of instrumental means, which leads to negative changes in people's consciousness, in fact, it materializes consciousness. Of course, there is nothing wrong with the pursuit of material comfort, but we assume that there is a fair assumption in the words of the researcher of happiness and the author of numerous popular science works Laurent Gunel: "Material comfort does not bring happiness, but the lack of material comfort can affect happiness, overshadow it" (Ghunelj, 2020: 155).

And this is not because a person will feel a lack of something (in fact, we need much less than they convince us by forcing us to pay for the purchase of unnecessary things), but because if he does not work on his emotional intelligence, then he is completely open to pleasure aggressive psychological attacks of advertising posters and the environment in general. And that is why the main cultural problem of today is "the competition of humanistic and technocratic thinking, criteria for evaluating technical inventions, their safety and, especially, their impact on socio-cultural dynamics, the spirituality of the person himself (Surmaj, 2010: 21). Human happiness is not a set of goods and services, as they try to convince and force him to buy. Moreover, research led by Harvard Business School professor Ashley Willance proves that the more money we spend on freeing up our time, the happier we become. It is necessary to calmly and consciously perceive all information scum and noise, which to one degree or another affect our consciousness, while not changing our beliefs and value orientations. For this, it is necessary to take into account that the information society is a society of knowledge. There are extremely many opportunities to learn real information, research results, which can affect well-being, and the state of happiness and life satisfaction.

The first thing to emphasize is the state of awareness. The existence of a person on earth is similar to the existence of a star in the sky – the same infinity of space and time. But we almost never think about how our day goes. It is necessary to try more often to recognize those unique moments when she sees not the steering wheel of her car, not the bar code of a bank card, not a shovel or a pack of washing powder in her hands, but the whole sky that surrounds her. With all the beautiful things that the Lord has revealed to us. Such moments – awareness and peace – give energy for all things.

This is communication with other people, and the desire to do a good deed, and to stand up for the truth, and to be a good person – that is, a person who can respect himself. Social intelligence is the desire to understand one's higher purpose. Life can seem like a never-ending Sisyphean struggle, because one is always trying to control something and achieve something. The result is new castles in the air – new aspirations, and later – a feeling of futility, because each new purchase makes you happy for only a few days.

Let's name five forces – five internal attitudes that should become the beliefs of a person who seeks to increase his happiness indicators. The first strength is trust, when a person welcomes all forms and manifestations of life, and does not fight against it. By forming trust in the heart, a person automatically opens up to joy and positivity, learns to transform aggression and tension into inner freedom, does not give in to helplessness and insecurity. Trust is the first to help on the way to increase happiness, because a person needs to reduce anxiety and tame fears. Moreover, a child is born. But the

constant appeals of the parents: "This dog will bite you..., you will fall...", etc., which the child hears, lead to contraction, or complete replacement of trust with mistrust (Falder, 2021: 42).

How a person perceives a situation determines whether this situation is extremely negative or acceptable. The result of a person's high spirituality is a firm belief that the Creator will never allow him to be hurt – this is a state in which the eyes radiate peace, which will be transmitted to everyone – his environment, relatives, random people. Happy people are people who trust the world. So, let's try to determine how you can consciously increase the level of your own confidence. Psychologists say that for this a person needs to act as if there are no dangers, because trust is formed by acceptance. The content of this rule is an important psychological axiom: you cannot sacrifice real life to expectations.

Socialization with a capital "k" is what European psychologists call the term "karma" – the principle of perceiving cause-and-effect relationships. If we abstract from the deep essence and history of this term, which is studied in the East, it can be succinctly said that this Eastern concept offers an easier perception of life's ups and downs, and therefore trust. In a certain sense, it is about the path to happiness.

The religions of the world teach an important statement: life responds to a person's choices. Illness is the body's reaction to the harmful effects that we exert. Psychological pain is a consequence of other people's actions and voices penetrating the consciousness. In Tibet, where a large proportion of long-lived people are known, the following proverb sounds completely scientific: "Let a person's vision be as wide as the sky, but let him sift his actions like fine flour".

Mindfulness is a concept in modern psychology that is defined as continuous monitoring of current experiences, that is, a state in which the subject focuses on experiencing the present moment, without delving into thoughts about past or future events. This is the ability of consciousness to introspect one's own activity, that is, to observe one's own thoughts and feelings (Cymbaljuk, Janycjka, 2004: 146).

In the language of practical actions, introspection is a state in which a person thinks and understands that if he leaves the bottle in the forest, no one will see it, but the world will see it – therefore, everyone... If a person comes with peace, he will receive peace, and vice versa. ... In the human heart – in the secret center of our relationships with ourselves and with others lies love. If we lack trust, we will always be looking for a real home, if there is trust, our home will be everywhere.

The second component and, at the same time, a prerequisite for happiness is a person's ability to accumulate and release energy – this is vitality, drive, determination, and spiritual elevation. In order to unlock the fountain of energy, you need to get rid of fatigue, get enough sleep, understand the relationship between everything you touch and what surrounds you with the physical state of your body. It is necessary to explore internal feelings: what annoys a person, what is really desirable. "Energy that flows freely, like a river without a dam, can be dynamic and have animal strength!" (Falder, 2021: 89).

And as one philosopher said: "It doesn't matter what you do, as long as you practice as if your life depends on it. When talking about energy, experts mean not only the energy of a person for his work, career and daily, related problems – because this is often a problem of human ambition. In order to feel happy more and more often, it is necessary to save a significant amount of energy for those things and people that bring joy and pleasure: learning new things, rest, travel, and anything that is potentially exhausting and gratifying.

The third psychological force that helps you feel happy more often is presence in every moment of your life. This is awareness, and as its highest level – awakening. After all, we – in the currents of modern life – constantly fall into ignorance, a state opposite to awareness. Because we constantly devote ourselves to some goals and results. And in the best case, we remember some fragments – we planted two boxes of potatoes in the spring, and collected four in the fall.

Our task is to constantly return to life, to see how the apple tree blooms, what was the blush on the child's cheek that morning, etc. Mindfulness is like an elephant's foot print. It is so large that it can contain the prints of all other animals. Mindfulness includes all other methods and ways of inner development. To date, this truth has been understood in the world of science, business and politics.

Being aware, being able to return to a state of awareness, not losing the ability to be in it is a spiritual practice that is not far from a rational commercialized life, but a specific quality and requirement for personnel, which is highly valued, and without which access to most prestigious positions is impossible. The fourth psychological state and human quality, the possession of which contributes to the feeling of happiness, is peace.

A state of emotional and mental harmony, when a person feels inner balance and lack of stress. When mind and body are in harmony, and a person can calmly react to external stimuli and life situations. Striving to apply calmness, a person is able to feel carefree and courageous in the face of any challenges. As practical actions, psychologists advise: 1) regular meditation practices and conscious perception of every moment of life; 2) regular physical activity, which helps relieve muscle tension and relax, and also promotes the production of endorphins; 3) effective mastery of emotions, knowledge of self-regulation techniques and stress relief strategies; 4) attention to one's physical and psychological health, taking care of sleep, nutrition and relaxation; giving priority to one's well-being (Skrypchenko, Dolynsjka, Oghorodnijchuk, 2021: 153).

The fifth psychological component of being happy is a combination of all aspects of understanding one's own abilities and limitations, combined with valuable thoughts and ideas. When a person goes on the path of self-discovery, he pays attention to his own potential and the abilities of others. Wise – who knows that he knows little, but enough. A wise man who understands that to have everything is to have the most valuable thing. Wise – who waits patiently, but at the same time enjoys everything around, regardless of whether it is sunshine, rain or snow.

So let's summarize: First, a person's happiness depends on his age – with each year of maturity, a person who does not realize the desire to preserve his ability to feel happy risks becoming increasingly disappointed and unhappy. Second, self-development, as a spiritual path to increased confidence, increased energy, peace, awareness and, ultimately, wisdom, is a real opportunity for each person to maintain happiness indicators throughout life.

Thirdly, all spiritual forces and qualities – trust, energy, awareness, calm and wisdom – work together, reinforcing each other. The purity of a person's intentions and actions, combined with sincerity in relations with the world, is an extremely important basis for realizing oneself as happy. Moral education is the basis of personal development. Our touch to the world must be a touch of love, then we are carefree, calm and steadfast in our progress.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-20>

## MANAGING CREATIVE INDUSTRIES DURING THE TRANSITION TO A DIGITAL ECONOMY IN THE MINDS OF THE WIN AND THE HOUR OF WAR

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**Abstract.** This is a modern product that is developing dynamically and poses new challenges to companies. The development of technology and the vastly accelerated processes that take place in the modern world create the need to change traditional approaches to doing business. The use of standard methods no longer allows for leadership and success in the market. The article reveals the essence of creative industries, their specificity and highlights the current aspects of the development of the creative industries sector in Ukraine as a type of economic activity. The essence of the concept of “digital platforms” is explained and their role in the economic growth of the region is determined.

The work examines the problems and key aspects of managing creative industries during the transition to a digital economy in the minds of war and war. Voted about the importance of digital talent, the new generation and change the way management looks. Characteristics of key changes in management systems for creative industries in the digital economy are given.

**Key words:** digitalization, economic processes, human capital, digital platform, digital projects, business processes, innovative technologies.

**Introduction.** Many scholars focus on the controversial issues of managing creative industries enterprises in the context of the national economy's digitalization. Scholars such as T. Galakhova, N. Karasyova, S. Shechgluk, V. Mazurenko, and A. Kholodnytska have studied creative industries as a new economic sector rapidly developing since the 2000s in developed countries. The problems of the digital economy and its impact are intensively discussed in the domestic and foreign scientific literature, particularly in the works of D. Bell, D. Tapscott, N. Negroponte, and M. Voynarenko. The views of researchers on the complexity of the process of implementation, dissemination, and assessment of the consequences of transforming the management functional activities of an organization in the context of digitalization are contained in many publications by both foreign and domestic authors: T. Bozhydarnik, O. Vartanova, L. Dovgan, O. Kuzmin, I. Lytvyn, I. Pidkamynnyi, O. Prodius, I. Svydruk, etc. Despite certain scientific developments in the theory and practice of management, some issues still need to be solved, and there is a need to improve methodological tools to identify critical benchmarks and directions for further activities, taking into account international experience.

The purpose of the study is to identify the peculiarities of managing creative industries enterprises in the transition to the digital economy and to form an algorithm for implementing the process of enterprise digitalization in the conditions of war and post-war.

**Main part.** At the present stage, a new economic system – the digital one – is being actively formed in the global information society. There is a digitalization of financial processes and pene-

tration of information technologies in all spheres of activity. New requirements arise for the sources of competitive advantages of enterprises and practical concepts of their operation and management.

Today, developed countries, driven by the scarcity of material and natural resources, seek new ways to build their economies. They generate income mainly from intangible products and services, and creativity, i.e., the ability to think outside the box and find unique, original ways to solve problems, is becoming an essential factor for the successful development of territories. Creative industries are a driving force for innovation and a catalyst for economic transformation in Ukraine's monetary policy.

The relevance of issues related to the peculiarities of managing creative industries enterprises in informatization and digitalization is significant in war and post-war. It is necessary to organize the enterprise's activities, taking into account the peculiarities of the transition to new principles of the digital economy, forecasting possible related problems, and developing solutions and proposals to minimize the negative consequences and enhance the main result of the enterprise's activities. Effective management of available resources and business processes in creative industries based on innovative technologies, becoming the most important management tools, can also provide a significant competitive advantage.

Creative industries have been developing rapidly, forming the basis of the broader concept of the creative economy. Creative industries are types of economic activity that aim to create added value and jobs through cultural (artistic) and/or creative expression, and their products and services result from individual creativity (Creative economy: a new economic era of the XXI century, 2021). Creative industries create a new (unique, innovative) product or service, and representatives of these activities aim to make a profit.

Small enterprises or individual entrepreneurs represent the most creative industries. These are primarily young companies just at the business formation stage. With their practical support, they can grow into large enterprises and holdings.

The success of these enterprises is a vivid example of the compelling attraction and use of creative human capital. Creative human capital can be defined as a set of original knowledge, creative abilities, skills, innate talents, and the costs of mastering or developing, which can generate future income from creating innovative products (Poznova, 2021: 40).

It is the creative class that determines the order of development of enterprises, as it is this class that, through employment in the creative industries, promotes the implementation of new ideas, technologies, and innovative content and determines the nature of modern production and consumption in the war and postwar period. In addition, representatives of the creative industries are responsible for the interaction of the creative sector with traditional, raw material-based industries for their innovative development. On the one hand, within the socio-cultural space, creative sectors act as a new vector of cultural development, where the unifying principle is the creative component, with the active use of innovative technologies and scientific discoveries. On the other hand, creative industries are becoming a significant driver of economic growth, as their capitalization is growing worldwide.

As emphasized in the United Nations General Assembly Resolution 74/198 (UN General Assembly Resolution, p. 3/5), the creative economy makes a multifaceted contribution to the achievement of the Sustainable Development Goals: poverty eradication, gender equality, decent work and economic growth, industry and innovation, sustainable production and consumption patterns, means of implementation and global partnerships, etc. The creative economy promotes social inclusion, cultural diversity, and human development. For these reasons, creative industries are crucial for implementing the 2030 Agenda.

During the war, the creative industries experienced an outflow of talent, reduced funding, decreased demand for cultural products and services, and the adverse effects of broken supply chains. State funds allocated for culture in peacetime were directed to support the Armed Forces of Ukraine under

martial law. At the same time, creative industries have a chance to become the engine of Ukraine's recovery after the war. Some entrepreneurs continue to work, exporting creative products and supporting the country's economy.

The peculiarity of the creative industries is that they can be independent of a specific location, which is not essential in digitalization, and that they have quick access to creative production tools, additive technologies, and artificial intelligence.

One of the fastest-growing sectors of the creative industry is marketing and advertising, which has a unique potential because it uses many areas of other sub-sectors, having in its arsenal the main creative tools: design, video, audio, photography, IT technologies, computer services, and printing. Analog marketing has remained, but its time has come to an end.

Digital advertising is a considerable number of tools, platforms, and formats updated monthly or even more often. At the same time, the main thing distinguishing digital from analog advertising tools is the ability to communicate with users in a personalized way using targeting, a mechanism for targeting advertising to a specific target audience, which is advertising that technical tools can measure. Digital offers enormous opportunities to measure the effectiveness of advertising campaigns – to connect not only with the audience at the level of age or social group but also with individuals, offering services and products that are suitable for them. Examples of digital growth include giants such as Rozetka, OLX, Prom, and other e-commerce projects primarily prioritizing digital promotion channels.

The modern activity of creative industries is characterized by the formation of particular economic behavior in the digital space. This results in the digitalization of the financial sector itself and the growing role of innovative technologies in all areas of creative activity, where the most important technology is the digital platform.

A digital platform is a critical digital transformation tool that enables information exchange and transactions between many users. It is a set of technological solutions (technologies) that create the basis for the functioning of a specialized system of digital interaction, reducing the cost of transaction costs and eliminating the role of an intermediary. At the same time, participants are independent of each other (Sichkarenko, 2018: 28).

Digital platforms, in the broadest sense, include social networks, marketplaces, video hosting, smartphone, tablet, and computer applications, as well as ecosystems that combine all or part of these elements. The peculiarity of digital platforms is that they provide direct access to consumers, which can be both B2B and B2C segments. Business-to-business (B2B) includes all levels of information interaction between businesses. Business-to-consumer (B2C) is one of the most promising areas for businesses to operate in the retail market, and it is based on e-retail (Kovalchuk, 2021: 8).

The role of digital platforms is to be the basis for economic growth, as they increase labor productivity, reduce business costs, increase the availability of information, and reduce barriers to entry into new markets. At the same time, new business models based on the introduction of digital platforms are customer-oriented. Thanks to the current level of digitalization, creative companies are growing 3–5 times faster than the economy as a whole.

Changes in economic policy directions under the influence of economic digitalization are an era of constant transformation. These changes require detailed consideration and immediate response to managing a creative enterprise in wartime and post-war conditions.

The management of creative industries enterprises in the new digital economic order should be based on the transparency and structure of all business processes, applying an effective knowledge management system and staff motivation, and considering the peculiarities of enterprise management in digitalization. Figure 1 shows the main features of managing creative industries enterprises in digitalization.

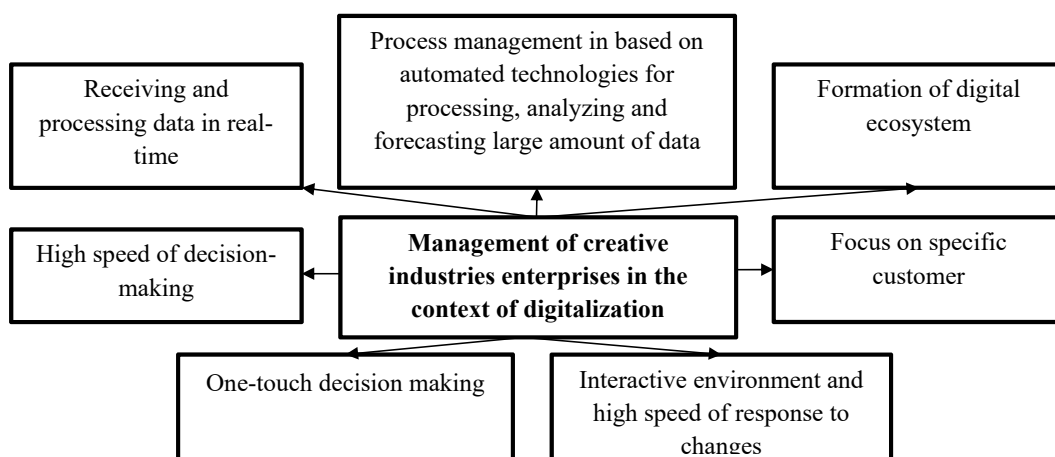
According to the authors, the main directions for improving the management system of creative industries enterprises in the context of digitalization are it is increasing the importance of knowl-

edge and training. It is not enough to find the right staff; it is also necessary to create conditions that will allow the development of understanding of each person and the entire enterprise. Frequent job changes in search of variety characterize the millennial generation. Millennials are the first generation who cannot imagine life without digital technologies (Millennials. How Generation Y is changing the world, 2020).

It is necessary to create an atmosphere, comfort, and opportunities within the company that will allow you to retain highly qualified personnel for as long as possible. Educational programs, training, the use of online resources, the involvement of all employees in the development of the enterprise, and many other practices are used by digital economy companies. In a rapidly changing environment, knowledge becomes outdated instantly, and information becomes open and accessible. In such conditions, every company should strive for maximum and continuous development.

*They are changing the nature of organizations' activities.* The development of technologies leads to their introduction into the activities of creative industry enterprises. The amount of computer work is increasing significantly. Information is transmitted remotely without any delays. Technologies such as big data, neural networks, blockchain, cloud computing, and virtual reality are being introduced. Such changes are driving the active development of creative industries, both under the influence of implicit factors related to the peculiarities of the industry's functioning and the emergence of new opportunities, access to new resources, and explicit factors – the growing demand for creative industries services against the background of new consumer needs in the B2B, B2C segments and their modifications in the context of the formation of the sixth technological mode: biotechnology; aerospace industry; nanotechnology; new materials with predetermined properties; quantum electronics.

*Changes in labor resources.* First, the requirements for company employees are changing. Nowadays, it is necessary to be confident in computer skills, master new technologies, and constantly develop. Highly skilled personnel capable of interacting with modern technologies on a first-name basis are necessary for businesses in the digital economy. According to a BCG study (How to Gain and Develop Digital Talent and Skills, 2017), tech-savvy personnel have the most significant effect in the following areas: digital business, internet marketing, digital development, analytics, and Industry 4.0. However, these areas are not only independent areas but also components of many companies. For example, first, data analysis is being implemented everywhere. Secondly, people are changing: a new generation has emerged that plays a vital role in the success of creative enterprises in the digital economy because of their technological savvy. The millennial generation is characterized by a rejection of useless work, titles, and bureaucracy, and they are eager to work in multidisciplinary



**Fig. 1. Features of enterprise management in the context of digitalization**



teams to develop and express themselves constantly. They need a high goal and work in the name of a goal. Such people also seek independent choice of schedule, maximum flexibility at work, ease of interaction with managers and colleagues, use of flexible work methods, and mobile devices. Thirdly, employers are more interested in the competencies and skills required for employment in the creative industries: a combination of fundamental skills in a specific professional and related field; digital competencies, including proficiency in specialized social media programs and digital interfaces; a universal set of creative, technological, educational, and entrepreneurial competencies; erudition, reading, supervision, and orientation to cultural heritage; meta-subject skills – communication, teamwork, emotional intelligence, public speaking, self-presentation, and self-promotion.

Digital projects should be directly carried out by qualified personnel, called digital talent. Typically, a transformation team consists of a small but super-skilled "core" of digital talent and a group of staff who do not have unique knowledge and competencies. At the same time, both categories of personnel are equally crucial for the ultimate success.

In 2023, the talent shortage reached a historic 77%. In this regard, companies are focusing on investing in their employees. For example, 71% of employers train and retrain their current staff. In addition, 51% are creating new temporary positions, and 43% are focusing on the introduction of technology and process automation.

The BCG study (Strack, 2017) notes that the biggest problem is not even cybersecurity or the required amount of investment but the need for qualified employees. Adopting and adapting technologies is possible, but the bottleneck is those who can adapt, implement, train, and optimize processes based on new technologies. Digital talent is already in high demand, and large companies are forced to use less traditional ways to attract it. There must be more than a conventional human resource management strategy to attract digital specialists. It is necessary to consider the peculiarities of digital specialists to understand how these young people with very different experiences and education think. These can be employees with a classical IT education, freelancers, entrepreneurs, and even students.

These people have a digital mindset. They are entrepreneurial, data-driven decision-makers, have experience working in multidisciplinary, international teams, and want flexible employment. Overall, digital talent is a new type of employee. They are flexible, modern, and well aware of their value to employers. Companies named the digital platforms work.ua, robota.ua, jooble.org, olx.ua, and Telegram as a place for recruiting and finding new employees, freelancers, or outsourcers.

It can be said that a new list of professions is being formed that will carry out digital transformation as a supportive business process. The existing experience of implementing IT projects shows that the main problems arise not at the level of solution development but at the stage of adaptation and implementation of this solution. Automation of many processes using new generation artificial intelligence and robotics technologies will require a large number of people who are experts in technological innovations, on the one hand, and those who understand the specifics and business processes of a particular business, on the other hand.

The impact of technology on business management has been studied for quite some time. Numerous technological innovations will require modification of the management system. It should be assumed that the automation of technological and management processes will be carried out gradually but with a tendency to accelerate. Shortly, many companies will have to implement several waves of projects on new business process reengineering. This creates a demand for business analysts capable of designing and administering complex management systems that change in wartime and post-war conditions.

As a result of the transformations, the control system is finally turning from a black box into a "chip." The Internet of Things and wireless sensors, widely implemented as part of the Industry 4.0 concept, provide increased transparency of business processes. Even now, the use of ERP systems expands management capabilities and simplifies the creation and accounting of the results of teams

of employees from the company's divisions and external sources, which allows for planning organizational changes. An ERP system provides automation of business process management, which speeds up the execution of tasks and reduces the likelihood of errors. This helps the company to increase efficiency and reduce the cost of production, warehousing, human resources, finance, and other operations (What is an ERP system? Why does a business need it?, 2024).

The use of big data and the development of information systems make it possible to track the sequence, speed, and quality of operations and calculate and budget the costs of low-level operations. This implies a qualitatively different level of available information, which allows us to obtain the exact cost of fulfilling a specific order for a particular client. Constant changes affecting many aspects of business determine the importance of developing an entrepreneurial spirit in a business's culture and management system. Bringing new products and services to the market, starting, launching, and setting up new processes and information systems requires entrepreneurial rather than just executive competence. The role of the entrepreneur is to take responsibility for the most challenging and risky period of transition, combining the available authorities in the internal and external environments of the enterprise. Another change in the context of constant instability during a full-scale war is the desire of creative industries to be flexible. The twelve principles of Agile (software development) (Agile manifesto and principles, 2022), which emerged in the early 2000s in the US IT sector, are already being actively applied in many other areas. Many methods or practices correspond to these principles, such as Scrum, Kanban, lean development, XP ("extreme programming"), FDD (function-oriented development), etc. The values or core ideas of Agile include: people and interaction are more important than processes and tools; a working product is more important than comprehensive documentation; cooperation with the customer is more important than agreeing to the terms of the contract; readiness for change is more important than adherence to the original plan.

Thus, the critical focus of Agile is to eliminate bureaucracy, develop speed and quality of work, and focus on stakeholder engagement and performance. Examples of companies that use adaptive technologies include the five largest enterprises of the creative industry in Ukraine – IT industry; Advertising, Marketing and PR; Audiovisual Art; Architecture; and Literature and Publishing: EPAM SYSTEMS LLC, GLOBALOGIC Ukraine LLC, INFOPULSE Ukraine LLC, INTELLIAS Institute of Information Technologies LLC, NETCREKER LLC (Nikolaeva, Onoprienko, Taran, Sholomytsky, & Yavorsky, 2021).

Other examples include:

Dynatrace – a platform for application and infrastructure performance management, artificial intelligence for operations, cloud infrastructure monitoring, and digital experience management, works in conjunction with AI technology across the stack to simplify cloud operations, automate DevSecOps, and help organizations do more with less in the cloud. Kyivstar has improved customer experience with Dynatrace, and OTP Bank Ukraine ensures the stability of online services with Dynatrace solutions.

Zillya is the only Ukrainian developer of innovative cybersecurity technologies. The laboratory has been successfully operating in Ukraine since 2009. It has been on the international market since 2011. To date, more than 3 million users have used their technologies. Partners include Panda, OPSWAT, Sunbelt, AhnLab, and others.

Smart City consists of a holistic concept of intelligent integration of information and communication technologies for monitoring and managing urban infrastructure.

In the digital age, the role of governance is also changing significantly. As environmental variability accelerates, traditional hierarchical bureaucratic structures gradually lose their effectiveness. An attempt to study existing non-hierarchical organizations was made by F. Laloux (2014: 73).

The description of turquoise companies is a new stage in management development when an enterprise is run by self-governing teams not subject to hierarchy and centralized management. Other

aspects of such organizations include: general participation, comfortable working conditions, a high level of freedom, an evolutionary goal that implies a view of the organization as an organism.

These features align with the values of Generations Y and Z, and younger employees are likely shaping such organizations. The digitalization of business processes significantly accelerates the decentralization of management. Increasing employee skills and reducing the volume of routine operations determine the nature of management at the new stage. The traditional organizational hierarchy is complemented by a system of horizontal management communications (supervisor-subordinate communications), which allows for a sharp reduction in the number of middle managers. Another area of change is the emphasis on knowledge.

As early as the 1990s, many works appeared that addressed various aspects of self-learning organizations. Such organizations are characterized by a unique environment that supports learning. It encourages disagreement with the majority, proclaims openness to new ideas, and values mistakes as an opportunity for development. Knowledge is recognized as a core value, and there is a seamless process of knowledge transfer and information flow within the company from top to bottom and bottom to top, as well as with the external environment. One of the forms of such organizations was the N-form corporation (Hedlund, 1994: 74), which had the following characteristics: temporary constellations of employees, priority of lower-level personnel, close horizontal ties, reduction of the role of management to creating working conditions and developing a general strategy.

During the 2000s, the organizational forms of innovative firms were generally divided into two groups: Japanese-style organizations (J-form) and broad-based democratic organizations. Both types of organizations aim at continuous innovation, but they differ in the characteristics of organizational structures, learning methods, and innovation competencies. A J-form organization relies on knowledge embedded in operational routines, group interaction, and a solid corporate culture. Learning and knowledge accumulation occur at the lowest levels and are spread throughout the organization through deep cross-functional interaction. Career stability is ensured by predominantly hiring from internal sources. New knowledge is generated by synthesizing, generalizing, and combining existing knowledge.

Edhocratic (from the Latin *ad hoc* – "by chance," English *ad hoc* – arranged for a given purpose) – used for non-standard and complex work; a characteristic type of power based on knowledge and competence, not on a position in the hierarchy (Popovichenko, & Shapa, 2020).

Control in management is maintained by setting rather intense goals. The performers choose the means of achieving the objectives (results-based management). Everyone is directly responsible for their actions and is rewarded depending on their contribution to the ultimate goal. Team support and interaction are critical. Democratic organizations are more suitable for breakthrough areas, but their relatively low knowledge accumulation is their weakness. This is due to the high turnover of employees and experts.

**Conclusions.** Today, we are witnessing a transition to a digital economy, manifested in accelerating scientific and technological progress, the need for continuous innovation, and other fundamental changes. The digital transformation of creative industries enterprises is occurring in many organizations' projections. It is not only the introduction of specific technologies and process redesign but also a change in the organization's culture and the mentality of employees. The digital economy development strategy is the primary trend that sets the vector of change. However, digitalization is only possible with large-scale staff training programs. Human resources are naturally conservative and usually lag in their ability to change and adapt to new working conditions. The main problem of projects transitioning to the digital economy in wartime and post-war is the need for more qualified personnel. Digital talents, young people of generations Y and Z, could be more evenly distributed worldwide. Their job requirements, motives, methods of work, and worldview are significantly different from those of older employees. The need to attract them is forcing companies to rethink their

attitude to staff, their recruitment, and management methods. The management systems of creative industries are undergoing significant changes. Adaptive principles (agile), the concept of self-learning organizations, and the concept of turquoise organizations are becoming more widespread. Employees of generations Y and Z are less and less separating work from their lifestyle and want to receive additional social services. The role of management is also changing: the need for management is decreasing, and the growth of horizontal communications is transforming the nature of management. Trends toward decentralization of management, abandoning rigid hierarchical relationships, and empowering employees are determining the nature of creative industries.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-21>

## DEVELOPMENT OF REMOTE WORK AS A NEW FORM OF WORK ORGANIZATION

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**Abstract.** The 21st century is the era of information technologies. With the advent of the Internet, which facilitated the development of opportunities for long-distance communication, new organizational forms, and labor relations began to emerge, a striking example of which is telecommuting.

The article provides a comprehensive analysis of the historical stages of remote work development, including a retrospective review of transformations over the past decades. The methodology of systematic analysis of literary sources was applied to determine the advantages and disadvantages for various interested parties, as well as to identify key factors for the successful implementation of remote work.

The results of the study demonstrate the impact of remote work on the quality of life of employees and the creation of certain problems for management and communications. The article contains recommendations for improving the efficiency and management of remote work in the modern business environment and considers possible prospects for the development of this form of work organization in the future.

**Key words:** remote employment, management of remote workers, information and communication technologies, flexible employment, remote work, technological transformation of employment.

**Introduction.** The modern world is characterized by rapid changes caused by globalization, technological progress, and increased competition, which require adaptation to new conditions of the socio-economic environment.

The dynamic growth of the market, the increase in enterprise costs, the pandemic, and hostilities in Ukraine have led to the emergence of a number of problems in the field of employment. At the same time, management skills do not always meet the requirements of the time, which forces us to look for new solutions to expand employment. In such conditions, enterprises need new approaches to the organization of work that will allow them to quickly adapt to changes and ensure the efficient use of labor.

Research shows that the use of flexible forms of employment, particularly remote work, can significantly contribute to solving this problem and, therefore, is an actual direction of scientific research.

**Analysis of recent research and publications.** Flexible forms of employment are the subject of research by Ukrainian and foreign scientists. Scientific works devoted to the issue of remote work include: Harashchenko L.P., Harashchenko V.V. (Harashchenko L., Harashchenko V., 2018), Stasiv O. (Stasiv, 2021), Sloma V.M. (Sloma, 2022), Andrushkiv B.M., Pogaidak O.B. (Andrushkiv, Pogaidak, 2015), Melnychuk O., Melnychuk M., Pavlichenko I. (Melnychuk, et al., 2022), Pryimak V., Mishchuk N. (Pryimak, Mishchuk, 2020), Pyöriä P. (Pyöriä, 2011), Strońska E. (Strońska, 2014),

Gerasimenko O.O., Shchedinina L.V., Rudakova S.G. (Gerasimenko, et al., 2017), Inshin M.I. (Inshin, 2014), Svichkaryova Y.V. (Svichkaryova, 2013), Bezzub I. (Bezzub, 2020), Rudenok A.I., Petyak O.V., Khanetska N.V. (Rudenok, et al., 2020), Yaroshenko O.M., Vapnyarchuk N.M. (Yaroshenko, Vapnyarchuk, 2022), Kuznetsova M.Yu. (Kuznetsova, 2020), Soich O.V. (Soich, 2018), Alexander A., De Smet A., Langstaff M., Ravid D. (Alexander, et al., 2021), Yang L., Holtz D., Jaffe S., Suri S., Sinha S., Weston J., Teevan J. (Yang, et al., 2022), Galanti T., Guidetti G., Mazzei E., Zappalà S., Toscano F. (Galanti, et al., 2021), Ferreira R., Pereira R., Bianchi I.S. (Ferreira, et al., 2021), Sullivan C. (Sullivan, 2012), Doshchenko A.V. (Doshchenko, 2014). The analysis of publications shows that the research data forms the theoretical basis of scientific research in this area. Scientists pay special attention to the study of remote work, and a significant part of their publications is devoted to management issues of remote employment, particularly the organization of business processes and technologies, as well as the management and motivation of personnel.

Thus, the relevance of the problem, its practical significance, and the lack of thorough scientific results regarding the development of remote work as a new form of work organization determined the choice of the topic for our research.

**The article's purpose.** The purpose of the article is to investigate the development of remote work as a new form of labor organization in the context of modern socio-economic changes. To achieve the goal of the research, the following tasks were addressed:

- analyze the stages of remote work development;
- determine the advantages and disadvantages of remote work for various interested parties;
- characterize the key factors for the successful implementation of remote work;
- analyze the prospects for the development of remote work.

**Research methodology.** To implement the goal and objectives of the research, a methodology was used, which includes:

- monographic method: study of monographs, scientific articles, and other sources devoted to remote work in order to highlight and substantiate the features of remote work;
- method of system analysis: clarifying the essential characteristics of the basic research concepts and describing key factors that affect the successful implementation of remote work in the organizational environment;
- comparative method: determination of advantages and disadvantages of remote work for employees, employers, and society as a whole;
- method of systematization: generalization of the results of domestic and foreign research on the prospects for the development of remote work.

The using of this methodology made it possible to conduct a comprehensive and in-depth study of the development of remote work, providing scientifically based conclusions and practical recommendations for various interested parties.

**They are presenting the main material.** Remote work has a long history dating back to the 20th century. In its early years, remote work was accessible only to a narrow circle of professions, such as journalists, writers, translators, etc. However, with the development of information and communication technologies, remote work became available to a wider range of employees.

The first concept of remote work was developed by the American scientist D. Nilles and his colleagues in 1972 (Nilles, et al., 1972). They proposed a model of work organization in which employees could perform their duties outside the office using modern communication tools. Even then, they emphasized that the level of communication development allows for a reduction in the number of employees in the office.

In the 1970s, telecommuting gained popularity in the United States, leading to the creation of companies specializing in providing remote work services. In the 1980s, remote work began to spread to other countries worldwide.

In the 1990s, with the development of the Internet, telecommuting became even more accessible and popular. During this period, various platforms were created that allowed workers to find remote work.

The COVID-19 pandemic, which began in 2020, acted as a catalyst for the further development of remote work. Many enterprises were forced to transition their employees to remote work during this period, resulting in telecommuting becoming an integral part of the modern work process.

The main features of remote work include:

1. Lack of a fixed workplace – employees perform their duties in a location convenient for them, such as a home office or any place with internet access.
2. Independent planning of working hours – employees independently plan their working hours and task schedules.
3. Use of information and communication technologies for communication with colleagues and the employer. Teleworkers use tools such as e-mail, video conferences, messengers, etc., for communication and information exchange.

According to Article 602 of the Labor Code of Ukraine, remote work is a form of labor organization in which the work is performed by the employee outside the workplace or the employer's territory, in any place chosen by the employee, using information and communication technologies (Code of Labor Laws of Ukraine, 2023).

Melnychuk O.F., Melnychuk M.O., Pavlichenko I.M. (Melnychuk, et al., 2022) conducted an analysis of Article 602 of the Labor Code and identified certain features of remote work (Table 1).

Table 1

#### Peculiarities of remote work

Criteria	Remote work
Application procedure	By concluding an employment contract in writing. During force majeure, it can be implemented by order of the employer without the mandatory conclusion of an employment contract in writing
Workplace	Outside the workplace or the employer's territory, in any place of the employee's choice using information and communication technologies. By agreement with the employer, it can be combined with work at the workplace on the employer's premises
Limitations in application	Prohibited in the presence of dangerous and harmful production (technological factors)
Mode of operation	The rules of internal labor regulations do not apply, unless otherwise established by the labor contract
Provision of means of production, equipment, software and technical means, etc.	It is determined by the employment contract, otherwise it depends on the employer
Working hours	It is distributed by the employee at his own discretion, without exceeding the limits of labor legislation
Rest time guaranteed	The period of free time is defined in the employment contract

A number of factors contributed to the spread of remote work, including:

- development of information technologies that provide the possibility of effective communication and cooperation at a distance;
- growing demand for high-quality services and goods that can be provided in real-time;
- a change in the values and preferences of employees who strive for greater flexibility and freedom in choosing the place and time of work.

In the 21st century, remote work became widespread, especially during the COVID-19 pandemic. Although even today it does not lose its popularity. According to the International Labor Organization, in 2023, more than 300 million people worldwide worked remotely.

The USA is the world leader in the number of remote employees. According to the US Bureau of Labor Statistics, in 2023, more than 21 million people in the country worked remotely. In Europe, this figure is about 10 million.

Remote work can take different forms. The most common is home-based telework, where employees perform their duties at home several days a week, using a computer, telephone, and email. Supplementary or occasional telework means working at home one day a week as a supplement to traditional office work. Center-based telework is a new approach where the company provides jobs for employees of other companies who work remotely. Mobile telework involves performing duties at least 10 hours per week outside the office using a computer to communicate while on business trips, at client sites, and while commuting (Rudenok, et al., 2020).

Such forms of work provide more flexibility to employees and contribute to the development of modern approaches to work organization. Each of these types of telecommuting has its advantages and disadvantages.

Home-based telework is the most common type of telework. It has several advantages for employees, including:

- convenience: employees can work in a comfortable place that meets their individual needs;
- flexibility: employees can independently plan their working hours and location;
- economic benefits: employees can save on transportation and food costs;

At the same time, home-based telework has several disadvantages, particularly:

- isolation: employees may feel isolated from the team and the enterprise;
- blurring of boundaries between work and personal life: employees may face challenges balancing work and personal life, working overtime because they are not limited by working hours and location.

Supplementary or occasional telework shares the same advantages as home-based telework but has fewer disadvantages since employees still have the opportunity to communicate with colleagues in the office.

Center-based telework is the safest type of telework, as employees are in an office environment but have the option to work remotely. However, this type of remote work is less convenient and flexible than other types.

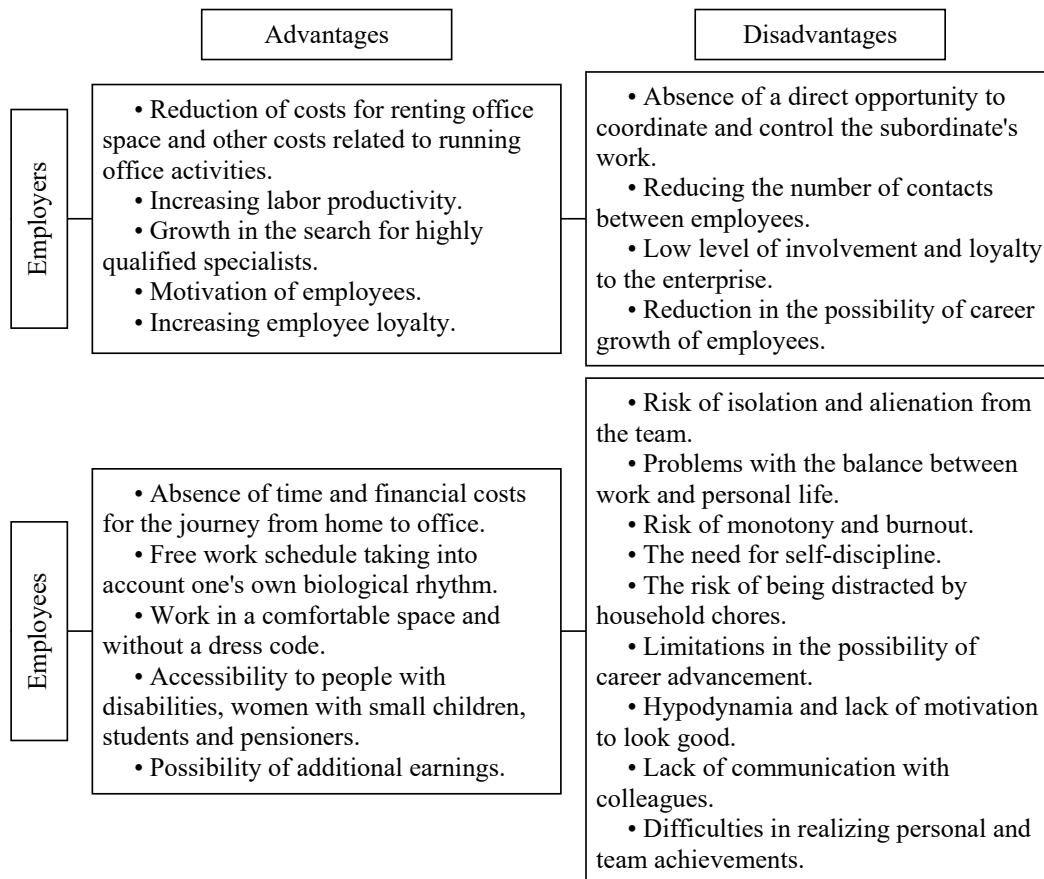
Mobile telework is the most flexible type of telework, as employees can work anywhere with internet access. However, this type of telecommuting is also the least secure, as workers cannot always control their work environment.

The choice of the form of remote work is made considering the specific needs of the employee and the company, as it has several advantages and disadvantages for both employers and employees (Fig. 1).

One of the key criteria for successful remote work is effective management. The manager needs to find a balance between independence and control of employees to ensure productivity and the achievement of collective goals. For this, you need to:

1. Clearly define the goals and objectives of employees so that they understand what is expected of them and have all the necessary resources to complete their tasks.
2. Establish regular meetings to discuss the progress of the work, understand whether the employees have correctly dealt with their tasks, and, if necessary, provide them with the necessary support.
3. Use technologies for remote monitoring of work to receive information about the current results of tasks performed by employees without the need to constantly monitor them.





**Fig. 1. Advantages and disadvantages of remote work**

The next criterion for productive work in any team, including those that work remotely, is effective communication. The manager should develop a communication plan that takes into account factors such as frequency, methods, and content of communication. In other words, they need to determine:

1. How often should communication with employees occur?
2. What technologies will be used for communication?
3. What topics should be discussed with employees?

The main communication tools used in remote work include:

- task managers (Trello, Asana, Jira): these tools allow employees to track their tasks and access information about the current status of other employees' work;
- network drives (Google Drive, Dropbox, OneDrive): these tools enable employees to collaborate on documents and files;
- messengers (Telegram, Slack, Skype): these tools allow employees to communicate in real-time;
- email: used for communication and document circulation;
- video communication (Zoom, Microsoft Teams, Google Meet): allows employees to communicate using video.

At the same time, it is important to use these tools correctly so that they contribute to effective communication, and not hinder it. For example, video communication should be reserved for important meetings and negotiations, while for routine communication, you can use email, messengers, or task managers.

An important criterion for the effectiveness of remote work is also its culture, which includes rules and norms that help employees work productively in remote mode. Such rules include:

- mutual observance of agreements on working hours, methods of communication, and other important issues;

- equal openness during communication;

- high speed of interaction.

The manager must create a culture of remote work that will promote effective interaction between employees. To do this, he needs to define the rules and norms of remote work, inform employees about them, and ensure their compliance.

Today, it can be said that remote work has become an integral part of the modern work process. According to a study by Owl Labs, in 2022, 36.2% of workers worldwide will work remotely. This figure continues to grow, and it is expected that by 2025, 52.2% of employees will work remotely.

A study by Deloitte found that businesses that transitioned to remote work before the COVID-19 pandemic had higher productivity and employee satisfaction scores compared to those that adopted remote work during the pandemic.

Even though remote employees do not work in the same office, meetings and sprints remain important elements of effective management. These meetings allow for the discussion of work, presentation of the latest projects, and decision-making regarding the future direction of the company's development. Additionally, they help employees get to know each other better and feel like a part of the team.

It is imperative to create a level playing field for all employees, irrespective of whether they work in the office or remotely. Treating remote employees as second-class citizens can lead to problems.

One way to create a level playing field is to provide remote employees with the opportunity to participate in all corporate events, such as holidays, training sessions, and business trips. Moreover, it is necessary to ensure that they have access to all necessary resources, including technical equipment, information systems, and documents.

Face-to-face communication is essential for keeping employees connected, whether they work in the office or remotely. Managers should make an effort to have more face-to-face conversations with their remote employees. This will help in better understanding their needs and problems, thus supporting motivation and productivity (Zaika, et al., 2020). Employee motivation is a key factor in the effectiveness of their work.

Therefore, effective management of personnel working remotely requires new approaches and skills from managers to enhance work efficiency and create comfortable conditions for employees.

**Conclusions.** Remote work is becoming increasingly popular, and for many enterprises, it is no longer just a temporary necessity but a way of organizing the work process. In the future, telecommuting will likely continue to grow in popularity. This is due to:

- the development of information technologies that allow effective collaboration at a distance and help overcome some of the disadvantages of remote work, such as isolation and blurring of the boundaries between work and personal life;

- changing values and preferences of employees. The growing popularity of remote work will lead to a change in the structure of the labor market, resulting in an increase in the share of self-employed and remote workers.

Therefore, remote work has the potential to become a new standard of work organization. However, for it to be effective for both employees and the enterprise, it is necessary to develop and implement new approaches to remote personnel management.

It is important to actively use digital tools for collaboration and communication, document all decisions made, provide constant feedback, and promote work-life balance.

Competent organization of remote work, which takes into account all these factors, will lead to a decrease in the company's costs, an increase in the productivity of employees, and can become an effective way of organizing the work process for them.

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## THEORY AND DEVELOPMENT OF POLITOLOGY

DOI <https://doi.org/10.30525/2592-8813-2024-1-22>

### THE SECOND KARABAKH WAR IN THE KAZAKHSTANI MEDIA OUTLETS

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**Abstract.** The second Karabakh war has become one of the conflicts attracting the attention of the world media from the geographical, geopolitical, energy and human rights aspects. This conflict has been watched with interest by the global community for its important impact on regional stability and international relations, and has been analyzed in different forms in various media and communicated to audiences. In this process, the Kazakh media also played an active role and transmitted information to the society on the topic from the first day of the war. In this research, the aim is to determine how Kazakh media reacts to the issues related to the Second Karabakh war, what information it conveys and what perspective it presents. For this purpose, the historical and diplomatic relations between Azerbaijan and Kazakhstan were first reviewed. Then attention was paid to Kazakhstan's media structure and development prospects. Finally, the approach of the Kazakh media to the Second Karabakh War was examined based on examples.

**Key words:** The Second Karabakh War, Kazakhstani media, Azerbaijan-Kazakhstan, Media.

**Introduction.** On September 27, 2020, in response to the next military provocation by the armed forces of the Republic of Armenia against our country, the Armed Forces of the Republic of Azerbaijan started decisive counter-offensive operations, and the Second Karabakh War ended 44 days later on November 10. Azerbaijan returned a large part of its occupied lands in the war, which ended with the signing of a cease-fire declaration between Azerbaijan and Armenia, mediated by Russia. This war was remembered as the second stage of the conflict between Azerbaijan and Armenia for the control of Nagorno-Karabakh. With the beginning of the war, violent clashes took place, and the Armenian Armed Forces shelled the peaceful settlements of Azerbaijan, causing the deaths and injuries of civilians.

The second Karabakh war attracted a lot of attention in the regional and international arena, and had a significant impact on the stability and security of the region. As one of the countries with an important position in the world due to its geographical location, energy resources, geopolitical importance and economic potential, Kazakhstan has not remained indifferent to these events and has made efforts to resolve the issue peacefully. In general, Kazakhstan's South Caucasus policy was aimed at promoting stability in the region, increasing economic cooperation and ensuring regional security.

The Second Karabakh War was also in the center of attention of the Kazakh media and was closely followed. Thus, the war was comprehensively covered and analyzed in regional and international aspects in the Kazakhstani media. At the same time, the steps to be taken to end the war and establish peace were carefully followed by the media and Kazakhstan's mediation efforts in this process were supported.

**Development perspectives of bilateral relations between the republics of Azerbaijan and Kazakhstan.** The relations between Azerbaijan and Kazakhstan have always been friendly and cooperative, formed by historical and cultural ties. After the collapse of the USSR, both countries gained

independence without wasting time and established diplomatic relations, and these relations were further expanded with the opening of embassies. In the new foreign policy concept formed by the national leader of Azerbaijan, Heydar Aliyev, relations with Kazakhstan have gained great strategic importance. The close cooperation and friendly relations between the two countries have become a decisive factor for the stability of the South Caucasus and Central Asia. The first meeting between the presidents Heydar Aliyev and Nursultan Nazarbayev in 1994 demonstrated the determination of the two leaders to strengthen the relations between the Turkish states. In 1996, President N.Nazarbayev's official visit to Azerbaijan resulted in the signing of a number of agreements that strengthened strategic cooperation between the two countries. In 1997, President Heydar Aliyev made an official visit to Kazakhstan. The documents and agreements signed during this visit reflected concrete steps taken in the direction of further deepening and expansion of relations between the two countries. Among the signed agreements, those related to cooperation in the field of energy are have importance specially. These agreements have facilitated the regulation of the use of energy resources such as oil and natural gas and their transportation to international markets. At the same time, the abolition of the visa regime between the countries strengthened the relations between the people by creating conditions for people to cross the borders more easily.

In general, the close relations established by Heydar Aliyev with Kazakhstan during the leadership of the Republic of Azerbaijan have become one of the cornerstones of Azerbaijan's foreign policy. Mutual official visits and meetings between Heydar Aliyev and Nursultan Nazarbayev were of great importance in establishing a strong strategic partnership between Azerbaijan and Kazakhstan. Especially, the "Agreement on the sharing of the Caspian Sea" signed in Moscow in 2001 has been described by experts as one of the most important examples of the success of diplomacy between the two countries. This agreement aimed to determine the legal status of the Caspian Sea and regulate the use of energy resources. After that, cooperation relations between the two countries intensified not only in the political, but also in the economic sphere. Azerbaijan and Kazakhstan have also come together on regional platforms such as the Turkic Council and strengthened solidarity among Turkic-speaking countries. President Ilham Aliyev also paid special attention to cooperation relations with Kazakhstan in the country's foreign policy. During mutual official visits, great importance was given to cooperation in the field of energy, especially cooperation in the field of transportation of the rich carbon-hydrogen resources of the Caspian Sea to the world markets was of great importance. Kazakhstan's contribution to major energy projects such as the Baku-Tbilisi-Ceyhan oil pipeline has been highly appreciated. In addition, plans to transport Kazakhstan's natural gas to Europe through Azerbaijan in the future have been evaluated as part of this cooperation.

Kasim-Jomart Tokayev's official visit to Azerbaijan after being elected as the President of Kazakhstan played an important role in strengthening the diplomatic relations between the two countries. During the visit, attention was drawn to the regional and international importance of projects such as the Common Corridor, and successful results of joint activities in foreign policy were emphasized. The signing of the "Declaration on the strengthening of strategic relations between the Republic of Azerbaijan and the Republic of Kazakhstan and the deepening of alliance mutual activity" has marked the beginning of a new stage in the relations between the two countries. In addition, during the visit of Kasim-Jomart Tokayev to Azerbaijan, President of Azerbaijan Ilham Aliyev was awarded with the highest order of Kazakhstan "Golden Eagle", which embodied the value of friendship and cooperation between the two leaders (Taghiyev, 2022).

In general, this visit made a great contribution to the strengthening of diplomatic relations between the two countries, and to the increase and expansion of cooperation in regional and international projects. This visit shed a positive light on the future cooperation between Kazakhstan and Azerbaijan and created conditions for the development of closer relations.

**Characteristic features of the media structure of Kazakhstan.** The establishment of the press in Kazakhstan began with the publication of the newspaper "Turkestanskiye vedomosti" in 1870 after the occupation of Central Asia as part of the colonial policy of Tsarist Russia. This state-controlled newspaper was seen as one of the main tools of propaganda in Tsarist Russia. However, over time, the local people have had the opportunity to be aware of the political processes taking place in the region through the newspaper, which has created conditions for their political awareness to increase (Gozogboev and Khudoygulov, 2018: 10).

After the tsarist Russia, during the USSR period, the Kazakh media operated under the absolute control of the Communist Party. In the USSR, the media was a powerful tool used to promote the ideology and policies of the Communist Party and to influence society. One of the main goals of the Soviet media was to strengthen the Soviet identity by bringing together the various ethnic groups, classes and regions that made up the Soviet society. Therefore, instead of emphasizing ethnic and cultural differences, the Soviet media used a language and style that promoted Soviet unity and solidarity (Temer and Yaldız, 2019: 175).

The first radio (1923) and television (1958) broadcasts in Kazakhstan also started to operate during the USSR. But until the period of reconstruction, there was strict ideological control and censorship in the field of media as well as in all social fields. Along with the reconstruction, journalistic freedoms expanded and independent media began to emerge slowly. This process was further accelerated by the declaration of independence of the country after the collapse of the USSR. In particular, the law "On Press and other Mass Media" adopted in 1991 was an important step in the development of the media and great importance in terms of the protection of the press and freedom of expression (Berdukul Han, 2019: 46).

Researcher Roza Nurtazina divided the evolution of media and information policy in Kazakhstan after independence into four stages. Therefore, in the first stage, the state controlled a large part of the media, and during this period there was almost no independent media. In the second stage, the independent media started to form and develop. During this period, the state's absolute control over the media decreased and independent media developed rapidly. In the third stage, qualitative and quantitative changes were experienced in the field of media. During this period, state-owned media and broadcasting companies were massively privatized, state funds and subsidies allocated for the state's information policy were transferred to state-supported organizations. At the last, fourth stage, Kazakhstan entered the period of stable growth of the information market. During this period, the state provided economic support to the media sector, measures were taken to increase the competitiveness of the local media market (Nurtazina, 2011: 141–142). During this period, at the same time, since 2008, the process of merging media companies has started. According to some experts, this process has led to the emergence of strong and competitive media institutions. But according to some, such mergers have created serious problems related to media diversity and independence. According to them, the size and power of media companies limited the diversity of the media industry and led to monopoly.

According to the statistics of 2022, a total of 3,676 periodicals, 191 TV channels, 84 radio stations, 959 news agencies and online media organizations are registered in Kazakhstan. Most of these media organizations use Kazakh and Russian languages. 1,852 media organizations use both languages. There are 853 media organizations that use only the Russian language and 693 that use only the Kazakh language. In addition, there are 1,512 media organizations broadcasting in three or more languages (including other languages) (Kazpravda.kz, 2022).

There are also more than 15 non-governmental organizations that support media development and press freedom in Kazakhstan. These organizations, in addition to providing legal support to journalists, serve to improve their qualifications. In addition, instead of the union of professional journalists, which defends the labor rights of journalists, organizations such as "Kazakhstan Union of Journalists",

which are professional unions of journalists, and "National Union of Publishers", representing electronic media organizations, operate in Kazakhstan (Abramov, 2010: 66).

In general, it is possible to note that the media sector in Kazakhstan has undergone significant changes and development in recent years, and has become a more diverse and dynamic structure. For example, on January 20, 2022, Kazakhstan hosted the First Central Asian Media Forum. The Central Asian Media Forum, held in Astana, the capital of Kazakhstan, has become an important platform for the strengthening of media cooperation in the region and the future of the media sector. At the forum, events and problems in the media field of Central Asian countries were touched upon and new media trends such as artificial intelligence technologies were discussed. The forum provided important opportunities for the future of the media and communication industry of the region (TRTAkaz, 2022).

**Reflection of the second Karabakh war in the Kazakh media.** During the first Karabakh war, Kazakhstan, as a newly independent country, tried to take a more neutral position, since it did not have much experience in international relations. Therefore, Kazakhstan tried to develop friendly relations with both Azerbaijan and Armenia, the parties to the war, in the context of the Commonwealth of Independent States (CIS). The government of Kazakhstan was in favor of a peaceful solution to the conflict between the two countries and called the parties to dialogue. Even in this direction concrete steps have been taken by the Kazakh government. Thus, during Kazakhstan's chairmanship of the OSCE in 2010, a dialogue platform for peace negotiations between Azerbaijan and Armenia was proposed, and a meeting between the Ministers of Foreign Affairs of Azerbaijan and Armenia was held in Astana on July 17 in this direction (Hamzaoghlu, 2021: 67). During the second Karabakh war, Kazakhstan supported regional stability and peace and acted within the framework of international law principles, and the media of this country constantly kept the issue of war on the agenda. In the materials published in the Kazakh media at that time, the negotiations conducted in the direction of the settlement of the Nagorno-Karabakh conflict, the activities of international organizations were analyzed, the consequences of the conflict and the political line of the forces interested in its continuation were evaluated from various aspects. In general, during the 44-day Second Karabakh war, the Kazakh media, with some exceptions, tried to be neutral based on the principle of objectivity.

The Kazakh Telegraph Agency-KazTAG has been one of the main resources that keep the war on the agenda. The news published by the agency on September 27, 2020, titled "The conflict between Azerbaijan and Armenia has started in Nagorno-Karabakh", provided information about the start of hostilities between Azerbaijan and Armenia in Nagorno-Karabakh, and attention is also paid to the position of both sides. In the news of the Kazakh Telegraph Agency-KazTAG was published the statement of the Ministry of Foreign Affairs of Armenia. In parallel with this, was published the statement of Azerbaijani Defense Ministry, in which reported that "armed forces of the country are launching a counter-attack along the entire contact line in the region, the decision was taken in order to stop the combat activities of the Armenian armed forces and ensure the safety of the civilian population". In the news, referring to the official Baku, it was emphasized that there are dead and wounded civilians on the Azerbaijani side (Kaztag.kz (a), 2020).

Through the Liter.kz website took a neutral position and contained various materials related to the war, mainly official statements of both sides. On September 29, 2020 the news titled "Armenian army demonstrated hitting Azerbaijani military equipment" published a statement of the Ministry of Defense of Azerbaijan announcing a large-scale counter-offensive operation in Nagorno-Karabakh (Mamirkhanova, 2020).

The UN High Commissioner for Human Rights Michelle Bachelet's statement was published in the news in the Zona.kz internet newspaper. In his statement, the Commissioner expressed concern about the resumption of military operations along the contact line in the Nagorno-Karabakh conflict zone and called on the parties to end military operations. At the same time, it was noted that for all this, the official Baku and Yerevan put the responsibility on each other (Zonakz.net (a), 2020).



Kazakh media resources such as "Ustinka Live", "Zonakz.net", "Kazakhstanskaya Pravda" systematically reported on the course of military operations during the 44-day war and published materials about the rockets fired at Ganja, Barda, Tartar, the firing of peaceful residential areas of Azerbaijan, and the targeting of the civilian population. On October 5, 2020, a large article titled "What threatens Kazakhstan in the conflict between Armenia and Azerbaijan" was published in the Internet newspaper Zonakz.net. In the article, the opinions of analyst, international expert Anuar Bakhitkhanov, professor of Caucasian-German University Rustam Burnashev, doctor of political sciences Andrei Chebotarev, political scientist Dosym Satpayev on the issue were studied. Their thoughts about the position of Russia and Turkey regarding the war, the active cooperation of Kazakhstan with Azerbaijan, and the role of Kazakhstan in the post-Soviet space were shared with the readers. The article also used Marat Asipov's "30-year war" material about the First Karabakh war, and quoted quotes about the killing of peaceful and innocent people (Yergaliyev, 2020). In addition, in the newspaper on October 29, in the news entitled "UN Condemns the Bombing of Barda and Stepanakert in the Nagorno-Karabakh Region of Azerbaijan", the statement of UN Secretary General Stephane Dujarric strongly condemning the shelling of Barda and Khankandi, resulting in the killing of civilians, was included. (Zonakz.net (b), 2020). Although the word Stepanakert is used in the title of the news, Khankendi is also written in the text.

On October 5, 2020, on the Forbes.kz website, the news titled "Aliyev announced the possibility of a military solution to the Nagorno-Karabakh conflict" summarized the interview of Azerbaijan President Ilham Aliyev to one of the foreign TV channels. "I often hear that there is no solution to the conflict by military means...I do not agree with that" and "If the international community cannot ensure the implementation of international decisions, Azerbaijan will do it itself," the news highlighted in the news. It was also mentioned in the news that the President of Azerbaijan Ilham Aliyev accused the Prime Minister of Armenia N. Pashinyan of disrupting the peace talks and that the Armenian leadership and some countries that want to maintain the status quo are responsible for the worsening of the situation in Nagorno-Karabakh (Forbes.kz, 2020).

In the large-scale article titled "War in Karabakh: Mercenaries from Kazakhstan – a myth?" published by the Kazakh bureau of "Azadlig" Radio on October 7, 2020, it was emphasized that Kazakhstan strictly adheres to the principle of neutrality in military conflicts and that the participation of Kazakh citizens in foreign military conflicts is illegal. In addition, the article noted that Kazakhstan continues its efforts to maintain neutrality in connection with the military conflict in Nagorno-Karabakh, and no attempt to join the ranks of mercenaries has yet been detected. It was also pointed out that the Armenian and Azerbaijani communities living in Kazakhstan live together peacefully and this conflict should not have a negative impact on the relations between the communities. The article also contains several interviews. In the interview of the representative of the Armenian community living in Kazakhstan, Artush Karapetyan, the impact of the recent conflicts in Nagorno-Karabakh on the relations between the Armenian, Azerbaijani and Turkish communities in Kazakhstan was discussed, and his views on the solution of the Karabakh conflict were brought to the attention of the readers. On the side of Azerbaijan, the views of Abulfas Hamidov, president of the Association of Azerbaijanis of Kazakhstan, were summarized. In his interview, Hamidov stated that Kazakhstan, as a secular state, provides equality to people of different faiths and ethnic backgrounds, and emphasized the importance of following international legal norms for the resolution of the Nagorno-Karabakh conflict. Hamidov also noted that negotiations regarding the status of Nagorno-Karabakh have been ongoing since 1994, and there has been almost no progress except for the ceasefire (Azattyq-ruhy.kz, 2020).

The Kazakh media paid a lot of attention to the end of the war, especially to the signing of a tripartite statement by the leaders of Azerbaijan, Armenia and Russia. For example, the KazTAQ information agency published on November 10, 2020, in the article entitled "Azerbaijan, Armenia and Russia signed a statement to end the Nagorno-Karabakh war", the views of the leaders of Azerbaijan,

Armenia and Russia who signed the statement were included. The article also emphasized that the occupied lands of Azerbaijan were taken back and the conflict was ended, and this was characterized as an important victory of the Azerbaijani leader. In addition, the article stated that Russia will play an important role in assisting the implementation of this agreement, and Turkey will also participate in this process with its peacekeeping mission. At the same time, Prime Minister of Armenia N. Pashinyan informed the readers that this decision is a painful and historical event, addressing his citizens (Zonakz.net (b), 2020).

The "Tengrinews" site, in turn, was particularly sensitive to the November 10 Declaration signed between Azerbaijan and Armenia with the mediation of Russia, and published the statement of the Ministry of Foreign Affairs of this country regarding the trilateral agreement (Tengrinews.kz, 2020). In general, the media of Kazakhstan highly appreciated the achieved peace and commented that the agreements were in accordance with the UN Security Council resolutions (Kaztag.kz (b), 2020). The leadership of the Turkish Council has also expressed its open and direct support to Azerbaijan in this matter. The General Secretary of the Council, Bagdad Amreyev, congratulated President Ilham Aliyev and the people of Azerbaijan on the historic achievement, the liberation of the occupied territories and the restoration of sovereignty over them (Kaztag.kz (c), 2020).

On the occasion of the end of the war and the victory, Yermentay Sultanmurat, the president of the "World Assembly of Turkic Peoples" International Organization, also addressed a congratulatory letter to President Ilham Aliyev. In his letter, Yermentay Sultanmurat emphasized that this victory is an important stage for the strengthening of the Azerbaijani nation and the Turkish spirit. At the same time, he assessed the strengthening of the territorial integrity of Azerbaijan as an important event in the general Turkish history (President.az, 2020). Kazakhstan's influential media outlets have also widely covered the Victory Parade dedicated to the victory in Baku (Azerbaijan-news.az, 2020).

Shortly after the end of the war, a film called "Nagorno-Karabakh-New Deal" was made by Kazakhstan Television. The film contains information about the occupation of Nagorno-Karabakh by Armenia, the migrations caused by this occupation, the lives of refugees, atrocities committed by Armenians in the occupied regions, the Patriotic War of September 27 – November 10 and its consequences, new geopolitical realities in the South Caucasus region, and regional development perspectives of the post-war period. . The film contains various interviews and opinions about the victory of Azerbaijan in the Patriotic War and the events that took place in the subsequent period (Modern.az, 2020).

**Conclusions.** The Second Karabakh War, which began on September 27, 2020 and lasted for 44 days, resulted in Azerbaijan's decisive victory over Armenia. Kazakhstan was one of the countries that revealed its position in the international arena during the war and commented on the course of events. The government of Kazakhstan emphasized the importance of stopping the military clashes during the 44-day Patriotic War, resolving the conflict on the basis of the principle of territorial integrity and self-determination of peoples, thereby demonstrating support for Azerbaijan. Also, after the war, the President of Kazakhstan K.J. Tokayev expressed his intention to provide comprehensive assistance to the revival and development of Karabakh as part of his first official visit to Azerbaijan. In this direction, the initiative to establish the Kurmangazy Children's Creativity Development Center in Fuzuli was a manifestation of the brotherly relationship between the peoples of the two countries and an example of humanitarian cooperation.

The events that took place during the Second Karabakh War were also closely followed in the Kazakh media. The attention and interest shown by the Kazakh media confirmed the regional and international importance of this conflict once again. The course of the conflict was closely followed and detailed analyzes were carried out in the Kazakh media. In addition, the intervention of regional powers and the role of the international community in this conflict have been critically evaluated in the media of Kazakhstan. In general, the principles of impartiality and balance of journalism have

been tried to be preserved in the media of Kazakhstan. This can be evaluated as an important factor in the understanding and interpretation of the conflict.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-23>

## FOCUS AREAS OF CULTURAL AND EDUCATIONAL ACTIVITIES OF THE RURAL INTELLIGENTSIA IN CHERNIHIV REGION IN THE 1920S–1930S

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**Abstract.** The article studies the phenomenon of the intelligentsia and rural intelligentsia and conveys the concepts of “intelligentsia” and “rural intelligentsia” by domestic scientists. The role of the rural intelligentsia of Chernihiv region in domestic cultural and educational activities is analyzed. The focus areas of the rural intelligentsia of Chernihiv region are highlighted, which consisted in the fulfilment of objectives in all life spheres of the Ukrainian village: education, culture, production, and improvement of the legal awareness of the population. It is emphasized the importance of establishing reading rooms (*khata-chyitalna*) and village centers (*silbud*) in Chernihiv region, which, in turn, exercised essential functions to raise the level of education and culture in rural areas. The authors analyze the main drivers, conditions and means of formation and functioning of educational centers, focus on the official duties of the heads of reading rooms and their assistants, and draw attention to the underpaid or unpaid work of the local intelligentsia, which worked as teachers, mentors, organizers, actors, lecturers, etc. It is also proved gaps in the operation of reading rooms, which were directly related to the lack of adequate funding, resource base, periodicals, and proper living conditions. The dynamics of their development and the peculiarity of functioning upon increasing ideologization and centralization of the Soviet regime are examined.

**Key words:** intelligentsia, rural intelligentsia, Chernihiv region, reading rooms, village centers, cultural and educational activities, state policy.

**Introduction.** The progress of socio-cultural aspects in the life of Ukrainian society has directly depended and depends on the views of the domestic political elite. As a result, the determination of anti-religious and cultural-educational activities always occurs in the political realm. The political activity of the educated stratum of society, both in Europe and Ukraine, affected the generation of public ideas and ideals. The progressive part of the population – the rural intelligentsia – played an active role in resolving religious, cultural and educational issues, in particular, of peasants.

The intelligentsia is a type of national elite that has begun to form and underwent a complex and long-term formation process since the early 19<sup>th</sup> century. The intelligentsia is a social stratum of the population that influenced the course of socio-economic and cultural processes in Ukrainian society (Borysenko, 2012: 22).

The concept of “rural intelligentsia”, as a separate socio-cultural and historical phenomenon, has recently begun to return to research interests of Ukrainian historians and foreign Ukrainian studies scholars. As for the definition of the intelligentsia after the brief domination of national governments in Ukraine, the utilitarian Bolshevik ideology of the 1920s imposed its own approach. After gaining

power, the Bolsheviks renounced their “intellectual status”. However, realizing that they would not be able to gain a foothold in quasi-state national republics without specialists, they started treating the intelligentsia less scrupulously. They were well aware that it is utterly unreasonable to oppress educated people who, following their professional duties, do mental work and take an active public position in society.

**The research object** is the rural intelligentsia of Chernihiv region.

**The research subject** is the performance of the rural intelligentsia of Chernihiv region in promoting cultural and educational activities.

**The research goal** is to analyze and generalize the impact of the rural intelligentsia of Chernihiv region on the progress of cultural and educational processes in rural regions.

**Objectives:** to analyze the rural intelligentsia’s impact on the formation, development and functioning of reading rooms and rural centers in Chernihiv region in the 1920s–1930s; to cover the main stages, dynamics and specifics of their development, as well as the focus areas of cultural and educational activities.

The study uses a set of general scientific theoretical and empirical **methods:** comparative, critical, synthetic and statistical tools (quantitative analysis and content analysis), and generalization.

**Results and discussion.** The intelligentsia contributed to the active development of cultural and educational activities not only in the central regions of Ukraine but also in rural areas, where uneducated population dominated. It is necessary to differentiate features inherent in the rural intelligentsia and distinguish it from the urban intelligentsia. The rural intelligentsia is a large group of intellectuals who worked (and often lived) in villages, which differed from the urban intelligentsia in terms of formation, professional functions, social status and, hence, had a different social psychology (Tsomra, 2007: 117).

Researcher V. Sheiko notes that the rural intelligentsia, which was mainly represented by the Ukrainian teachers – the largest stratum of the old intelligentsia, intended to end national oppression after the fall of the autocratic power and gain space for the progress of national culture (Sheiko, 2017: 204). They intended to give basic knowledge to rural residents, specifically children, and successfully performed tasks related to extending cultural and educational heritage.

In the first decades of the Soviet regime ruling, cultural and educational activity in rural regions was closely connected with the formation and practical functioning of an extensive network of village centers and reading rooms across the UkrSSR, where Chernihiv region held a special place, given its agricultural focus. To achieve the goal set, it is crucial to analyze the background of the emergence and formation of a network of village centers and reading rooms, their structure and practices, and thus, the participation of the rural intelligentsia in the implementation of cultural and educational work in the village.

Relevant activities of Chernihiv region’s rural intelligentsia in the period concerned are characterized by a rigid ideologization of cultural and educational work in the countryside. In general, as M. Zhurba noted, cultural work was not an end in itself for the Bolshevik regime – it was subject to the quite pragmatic tasks of ideological influence on the population. It has always involved political education measures (Zhurba, 2002: 265). For that reason, the Institute of the District Inspectorate of Political Education and District Methodological Councils was established.

First of all, thanks to the purposeful state policy on culture and education, reading rooms (sometimes called “club libraries”) became widespread in the rural area in the late 1920s. The low budget of the centers of political propaganda and cultural-educational work attracted the authorities, and they enthusiastically established support bases during the illiteracy eradication campaign, acquiring agrotechnical knowledge and rousing peasants’ interest in culture. At the same time, village centers (also known as *silbud*) began to function, which were considered a step higher in hierarchical terms since their main task was to engage the peasants in political education and assist in implementing

numerous ideological and economic campaigns. Reading rooms and village centers were the hubs of rural libraries, amateur hobby groups, propaganda lectures, and general educational reports.

The mission of village centers was to unite the peasantry and the agricultural proletariat with the urban proletariat into a “single working family”. The immediate task of village centers was to involve the poor and rural proletarians in the economic building of Soviet power by arranging rural economy and industry, as well as collective forms of economy. Thus, the resolution of the First Chernihiv Congress of Councils on the “organization of public education in guberniya (province) emphasized: “...reading rooms in the remotest villages should be the leaders of communism and socialist culture ideas. They should place the rural poor under their jurisdiction and shed the light of science on the dark environment through the fault of capital” (Borba, 1957: 332).

Village centers and reading rooms were supposed to replace the Ukrainian “Prosvita” (Enlightenment), the rural hubs of which were well known since the pre-revolutionary period. Considering these organizations counter-revolutionary, the Bolsheviks, in various ways, achieved their closure both in the city and the village. However, the Soviet authorities initially tried to control the Prosvita society and sovietize it. This was reflected in the organization’s charter. The document, in particular, emphasized the institution aims to disseminate socialist culture among citizens through “large-scale cultural and educational work” (Davydenko, 2002: 80).

Managers of most Enlightenment societies resisted turning them into centers of education of peasants in the spirit of socialism. Therefore, it was decided to finally liquidate these organizations. For example, the general meeting of the Nizhyn organization resolved: “Immediately establish a village center instead of the politically obsolete Prosvita (Davydenko, 2002: 81). A similar fate befell many institutions that were closed under the pretext of re-registration, but, in fact, it was a “purge”. Instead, village centers and reading rooms began to emerge in rural areas, which were supposed to combine political education work with the satisfaction of peasants’ cultural needs and be an obedient tool for educating the masses in the hands of the new system.

In general, in Chernihiv region, in 1925, there were 47 clubs, 146 village centers, 461 reading rooms, and 202 stationary and mobile libraries in the province (Yatsun, 1999: 53). Despite the slow spread of political education institutions in the left-bank districts of the UkrSSR, in Nizhyn region as of 1926, there were 101 educational organizations (reading rooms, village centers, schools for illiteracy eradication, libraries, etc.) (Horbanivskyi, 1926: 50); in Chernihiv district as of 1928, there were 106 village centers, 86 reading rooms, and 111 libraries (Sotsyalystycheskoe, 1983: 99).

Emerging village centers required help from the responsible authorities, hence it was proposed to provide all Hubradnarhosps (Huberniya Councils of National Economy) with all-round support and supply them with everything they needed. Village centers were about to become the only source of political education in the village aimed at understanding the class interests of the poor peasantry and the rural proletariat based on socialist culture and meeting cultural needs based on their economic interest. Teachers also highlighted the same: “the village center is the only political center, that is, it is the most expedient to introduce all political education measures through village centers, where the entire political educational asset is accumulated for cultural work,” one of the articles stated (Davydenko, 2002: 81). It was rural teachers, who belonged to the social class of the intelligentsia, were entrusted with the organization of political education work in the countryside because: “...the teacher deals with peasants all the time and knows better their psychology, needs, requirements, and interests,” emphasized in educational publications (Kinhi, 1926: 50). To achieve political education objectives, libraries, reading rooms, folk theaters, choirs, orchestras, museums, exhibitions, etc. were set up at village centers.

The council of the volost village center managed political and educational work on the ground, incl. the volost level. It consisted of 7 persons: the organizer of work in the village, representatives of the volost Komsomol center, the volost land department, the department of volost public education,

the volost committee of poor peasants, the volost union of land and forest workers, and the head of the volost village center. The councils of rural centers consisted of 3 persons (representatives of the rural Komsomol center and the committee of poor peasants and the head of the village hall). The village center was led by the head appointed by the county office, and the Council approved the general plan for the village center and supervised its implementation (Yurchenko, 1978: 96–100).

A characteristic feature of the activities of reading rooms was their seasonal nature: they did not operate in the midst of summer agricultural work and in winter due to the lack of funds for heating, and at other seasons, they were open every day, usually for 2–4 hours. The establishment of reading rooms was envisaged primarily in villages where there were no clubs, culture halls, libraries, and other culture and education institutions.

The primary goal of such associations was to conduct mass cultural and educational events, which covered the following areas: political education, anti-religious, industrial and agrotechnical propaganda, relevant agitation campaigns, celebration of revolutionary holidays, organization of lectures, talks, readings aloud, questions and answers evenings, performances of amateur groups, demonstration of “live” and “light” newspapers, etc.

The duties of heads and their voluntary assistants included running lectures, talks, collective readings of books and newspapers, anti-religious campaigns, library, educational and cultural work, etc. The vast majority of organizational issues were dealt with by the rural intelligentsia, which strived to raise cultural and educational activities to the proper level. More than anyone else, intellectuals realized the importance of the current situation in the village. But few people wanted to hold the executive since it was poorly paid, and in most cases, gratuitous.

The rural intelligentsia conducted practical cultural and educational activities through various hobby clubs at the mentioned institutions. Thus, natural science, library, military, self-education, literary, so-called “bezvirnyk” (non-believers), physical culture, and amateur art hobby groups worked at clubs and village centers. Natural science circles operated under the guidance of teachers and doctors, that is, rural intelligentsia. In circles, lectures were devoted to the Universe’s structure, the phenomena of nature, and evenings of questions and answers were held. For atheistic propaganda, natural science circles were organized. Political circles explained the policies of the party and the government and adhered to the program of political schools (Yurchenko, 1978: 96–100).

To achieve economic objectives, economic institutions were established at village centers: repair shops, rolling stations, research stations, fields, veterinary and matting hubs, outpatient clinics and model farms, handicraft workshops, cooperative shops, public canteens and tea houses, seed shops, grain cleaning farms, etc. Natural science clubs worked under the guidance of teachers and doctors. Therefore, L.P. Zlotnytskyi, a doctor of Sribrianska district in Pryluky region, was a board member at the local village center and gave 41 lectures in the first 2 quarters of 1928 (Otdel, 1928: 1). In the Danychiv reading room of Ripky district, the first lesson was held on Saturday, February 19, 1927. It attracted a large audience of listeners, predominantly youth. Teacher Mykhalchenko O.N. gave a lecture on “Worldbuilding”. In addition, lectures on health and history were given (Chernyhovskaia, 1927: 39). Political circles elucidated the policy of the party and the government and adhered to the program of political schools. The performance efficiency of circles of individual village rooms was evidenced by the fact that in the 1925 all-Ukrainian competition, the village center of Mala Divytsia was on top and won a cash prize, a radio receiver, film equipment, and books for the library (Yatsun, 1999: 53).

Reading rooms ran political and agricultural campaigns. Peasants gathered there to listen to reports, read newspapers and magazines, attend exhibitions, visit excursions, etc. Agricultural circles were set up at all reading rooms. They were the most crucial form of agrotechnical propaganda. Representatives of the agricultural intelligentsia gave lectures and reports on the regional specifics of agriculture, provided professional assistance to peasants, and organized excursions to research sta-



tions. Thus, at one of the lectures, it was proposed to inform the audience about the priority of sowing clover and potatoes in Polissia (Chernihiv region belonged to) (Kovaliv, 1926: 48).

At the outset of their existence, village centers were financed from the state budget, and with the transition to a new economic policy, they were transferred to self-sufficiency. As a result, given the new economic policy, institutions were allowed the following: to charge a fee for the use of premises, dining room, hotel, which were listed on the balance sheet of village centers; to use Soviet and sovkhoz (government-run cooperative) workshops and various agricultural hubs registered to village centers, using revenue earned for the needs of the village center; to use political education institutions, taking payment for performances (Yurchenko, 1978: 98).

The process of establishing a network of village centers and reading rooms faced some difficulties. Therefore, in 1924, an all-Ukrainian census of societies “Village Center” was conducted, which showed that one village center averagely united 102 men and, at the same time, the participation of women was low. A similar problem occurred Chernihiv region. Thus, according to the extracts from the minutes of the general meeting of Nizhyn district party organization, the discussion participant Shelmenko proposed eliminating the problem of low activity of women in public work by founding a nursery in the village.

As for the shortcomings in the performance of political education institutions, the speaker noted: “Books are scarcely used in reading rooms. Heads of reading rooms work poorly because they are underpaid, which means that in the future, it is necessary to pay attention to the salary of heads of reading rooms in order to improve their performance” (Kovalenko, 20212: 82).

Theoretical work principles provoked remarks. Thus, the provincial department of village centers of Chernihiv region complained about the program for agricultural circles. Dissatisfaction was driven by some aspects. First, the document’s explanatory note was of general nature and did not give practical advice on managing affairs. Secondly, the program did not contain specifics regarding some areas of the huberniya (province) that had inherent particularities of agricultural work. On top of that, it caused complaints due to “isolation from modernity”, the lack of recommended measures to combat pests. Consequently, 13% of crops were spoiled in the region in 1927, and the threat to a new crop remained in 1928. Thirdly, according to the huberniya department of village centers, the literature recommended for circles at village centers was improper and even detrimental given the practice of economic management. As a result, it was proposed using a book on crop rotation in arid areas and give preference to plants unpretentious to humidity. At the same time, Chernihiv region did not belong to the arid ones. The All-Ukrainian Department of Village Centers responded to those remarks. It reasoned some inaccuracies in the program by constant demands from regions about the availability of a universal document and the spontaneous emergence of agricultural circles in Chernihiv region. In addition, it was proposed to independently choose guidance materials for each individual district (Otdel, 1928: 34–35).

There were some shortcomings in the operation of open reading rooms. Therefore, in the village of Chortoryhy, Tulyholove district, no practical activities were carried out despite the fact that since the autumn of 1926, a work plan and calendar had been developed, various circles had been established, and there had been intention to publish a wall newspaper. The blame was laid on the institution’s head. Receiving payment in the amount of 40 karbovantsiv per month, no active actions were taken. Instead, peasants noticed that he was present at school all winter communicating with the female teacher. “Is he really going to work in the village center in spring and summer? With whom? No, it will not happen! In spring and summer, we are busy peasants – we have other things to worry about than visiting the village center,” one of the local activists was indignant (Sheiko, 2017: 203).

The Hlukhiv district village center also had problems. The main drawback was poor sanitation, particularly in the dining room: “You can face everything there: yesterday’s food, dirty dishes, and dirty housewife and maid. It becomes disgusting when you look at the people who serve you, and

this happens in the center, under the nose of the chief doctor,” complained a local correspondent. The institution’s manager was proposed to pay special attention to the current situation. The head of the Ponorntsia reading room was offered to extend its working hours in order to attract more peasants (Orhan, 1927: 25).

In the village of Buyanky, Ripky district, the head of the reading room, Ivan Lyzko, abused alcohol and squandered the membership funds, which provoked a supervision of the inspector from the district department of political education (Orhan, 1927: 69). Later, in the early 1930s, inspections were carried out purposefully – the authorities began to fight against the so-called “public enemies”.

**Conclusions.** Summing up, we can conclude that the network of political education institutions was represented in Chernihiv region primarily by village centers and reading rooms, which were one of the few means of cultural and educational work in the village for the rural intelligentsia. At the same time, it is essential to mark the numerous organizational and financial difficulties that stood in the way of the network’s formation. In addition, it is noted that cultural and educational work as it is was impossible under uncontested communist ideology. It was always aimed at propaganda effect on the population in order to raise a loyal citizen-producer, a cog of the system. The village “cultural forces” – teachers, doctors, and agronomists – had to play a leading role in those processes. Teachers and culture and education specialists were sent to rural regions not only to take illiteracy eradication measures but also to pursue large-scale political activities.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-24>

## THE MAIN DIRECTIONS OF MODERN DIPLOMATIC HISTORY OF AZERBAIJAN

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**Abstract.** On October 18, 1991, the declaration of independence of the Republic of Azerbaijan, located in a geopolitically important region, and the changes that took place in the international arena in the late 80s and early 90s brought to the fore the importance of formulating and implementing a new foreign policy in Azerbaijan. On March 2, 1992, the Republic of Azerbaijan, which began to be recognized by many countries of the world, became a member of the United Nations (UN). The recognition of Azerbaijan by the countries of the world and the establishment of diplomatic relations created the basis for the systematic integration of the country into the world community. After gaining independence, Azerbaijan established an optimal foreign policy to establish relations with foreign countries and international organizations and solve its problems peacefully. With the collapse of the USSR, more priority was given to establishing dynamic relations with foreign countries, especially Western countries and Turkey.

**Key words:** Azerbaijan, the history of diplomacy, international relations, the Second Karabakh War.

**Introduction.** Known as a reliable partner in modern world politics, Azerbaijan, the leading country of the South Caucasus region, successfully continues effective and mutually beneficial cooperation relations within the framework of both bilateral relations and international organizations. Its rich economic potential and favorable geopolitical position are of great importance in strengthening Azerbaijan's independence and protecting state interests. These factors create a good basis for an effective and purposeful foreign policy that meets the interests of the Azerbaijani state. However, the realization of the existing primary potential and favorable conditions requires a serious analysis of the processes going on in the world. By choosing democratic society and market economy as a strategic development line, the Republic of Azerbaijan tries to use tested global standards and human values, attracts the advanced technological and financial capabilities of developed countries, and establishes mutually beneficial cooperative relations with them. The establishment of diplomatic relations with many countries in the 1990s enabled the systematic integration of the Republic of Azerbaijan into the international world. The establishment of bilateral political relations has also created a favorable ground for the development of economic and cultural relations. Ensuring mutual economic cooperation plays an important role in deepening political relations and strengthening mutual trust.

**1. The main priorities of Azerbaijani diplomacy.** Today, Azerbaijan conducts a balanced foreign policy based on multi-vector cooperation, equal partnership and national interests. Azerbaijan's geographical and geopolitical position, current economic position and potential play an important role



in determining the country's foreign policy. In the first years of its independence, as a result of the efforts of the Armenian lobby, Azerbaijan was isolated from the international world, and its relations with most of the neighboring countries were aggravated (On the foreign policy activities of national leader Heydar Aliyev covering the years 1993–2003). The implemented foreign policy completely changed the position of the country in the global arena. Currently, Azerbaijan is not only a participant in the global political scene, but also an initiator and participant of important projects in the region, and a country distinguished by its reputation in the international world. Historically located at the intersection of different civilizations, cultures and religions, Azerbaijan, located in the lands where new communication, transport and energy corridors pass in the Eurasian region, has a great reputation in the region as a country connecting West and East, North and South (Central Asia and the South Caucasus, 2000). At the same time, Azerbaijan has gained the image of a reliable partner in the field of energy security. Not only neighboring countries, but also a number of European countries prefer Azerbaijan in energy policy. This trust was earned thanks to the international cooperation that began with the "Deal of the Century".

Azerbaijan's active foreign policy is not based on competition, but on cooperation and mutual support. Guided by these principles, the foreign policy of Azerbaijan, acting from the position of long-term national interests, pursues the vital goal of eliminating threats to the republic's independence, sovereignty, territorial integrity, and national security. One of the main priorities of Azerbaijan's foreign policy is the establishment of peace and stability at the regional level, the implementation of cooperation projects and the achievement of such strategic goals. Also, attracting foreign investments to various projects for the development of the country's economy for the purpose of more rational protection of the interests of the people of Azerbaijan is extremely important in this modern global world (The main directions of the foreign policy of the Republic of Azerbaijan, 2017). Thus, having chosen the path of democratic development, Azerbaijan is determined to fully realize the common goal of establishing and developing equal and mutually beneficial relations with neighboring and other states on a bilateral and multilateral basis in various fields.

Azerbaijani diplomacy attaches importance to mutual economic, commercial and political relations, and accepts the principles of geopolitical balance and neutrality. The first priority is to avoid joining military alliances and maintain *de facto* neutrality in the region. Azerbaijan did not join the Russian-led Collective Security Treaty Organization (CSTO) and was one of the first former Soviet Union republics to be free of Russian military forces and bases. Similarly, unlike its regional partners Georgia and Ukraine, Azerbaijan has no desire to join NATO. Instead, it focuses on practical and pragmatic cooperation with NATO and its members under the Partnership for Peace programme. Cooperation includes participation in demining projects, peacekeeping operations in Afghanistan and Iraq, public diplomacy and education programs, and other non-sensitive issues. It has established similar military cooperation with Israel, Belarus, Ukraine, Pakistan and many other countries (Hasanov, 2019: 8). Maintaining military *de facto* neutrality helps ensure Azerbaijan's security and reduces potential pressures and risks from regional power centers.

Secondly, Azerbaijan actively participates in existing regional cooperation frameworks, and at the same time proposes the creation of new multilateral institutions and platforms. It is the United Nations and its specialized agencies, the Organization for Security and Cooperation in Europe; European Union and its institutions, including the European Parliament and the Council of Europe; Commonwealth of Independent States; Organization of Islamic Cooperation; Economic Cooperation Organization; and developed active relationships and collaborations with many others. The Republic of Azerbaijan protects and implements its national interests by participating in international and regional organizations. Azerbaijan is one of the rare countries in the world that is a member of both the OIC and the European Union. One of the most important events in foreign policy was the election of the Republic of Azerbaijan as a temporary member of the UN Security Council with the support

of 155 countries between 2012 and 2013. This meant that the policy pursued by Baku in the region and in the international world was positively welcomed by other states and received the full support of 155 of the 193 UN member states.

Azerbaijan's election as a non-permanent member of the UN Security Council in 2011 became an important opportunity to seek the support of the international community for its foreign policy goals. Azerbaijan is also a founding member of a number of new regional organizations, including GUAM and the Turkic Council, as well as informal trilateral cooperation frameworks such as Azerbaijan-Georgia-Turkey, Azerbaijan-Iran-Turkey, and Azerbaijan-Turkey-Pakistan. Multilateral cooperation takes place not only in political or military fields, but also in economic and communication matters. This is shown by the North-South transit corridor, which includes Iran and Russia, the BTQ regional railway project, which includes Georgia and Turkey, and the TAP gas pipeline, which includes the Balkan countries and Italy. In 2019, Azerbaijan became the chairman of the Non-Aligned Movement, which is another important foreign policy achievement. The organization with more than 120 members has a strong voice in the international world (Regarding the foreign policy activities of the President of the Republic of Azerbaijan Ilham Aliyev covering the years 2003–2019). On December 16, 2021, the UN General Assembly as the leader of the Non-Aligned Movement proposed Azerbaijan's "affordable, timely and on providing universal access" adopted the resolution (Khalilov, 2021). This was another international success that strengthened Azerbaijan's position in the world.

As a result, it can be said that Azerbaijani diplomacy has two distinguishing features: creating and maintaining a balance, establishing pragmatic and rational relations. It was possible to crown military victories with these policies, which have been continued since independence and especially accelerated in recent times. A lot of lessons should be learned from Azerbaijan's diplomacy, which actively and flexibly reacts to attacks against Turkey through social media, press and local political institutions. Finally, Azerbaijan actively cooperates bilaterally with many countries to coordinate on political issues and develop economic opportunities, including trade and investment. Only 15 years ago, there were about 25 foreign diplomatic missions of Azerbaijan, including permanent missions to international organizations. Today, this number is closer to 85 (Diplomacy of the era of independence, 2023).

**2. The role of diplomacy in the results of the Second Karabakh War.** From the first days of independence, the Republic of Azerbaijan faced the military aggression of Armenia, and as a result, its internationally recognized territories were occupied, ethnic cleansing was carried out by the Armenian armed forces in those territories, and the entire Azerbaijani population was forcibly expelled from their homes (Ahmedov, 2020: 35). The former Armenia-Azerbaijan conflict The position of the international community regarding the solution is reflected both in the documents adopted by individual states in bilateral relations, as well as in the decisions and resolutions adopted by international organizations (Nagorno-Karabakh Conflict. Electronic texts) were required to leave their territories, the right of refugees and internally displaced persons to return to their homes was defended. These were made possible as a result of Azerbaijan's numerous appeals to international organizations and successful foreign policy.

The position of Azerbaijan in the process of negotiations on the resolution of the conflict was based on the norms and principles of international law, being of a principled nature, and remained unchanged within the framework of the ongoing process for many years. Armenia, which continues its aggressive policy, has sought to strengthen the results of the occupation of Azerbaijani lands by slowing down the negotiation process. Despite Azerbaijan's commitment to a political solution to the conflict, the demonstration of provocative and aggressive actions by Armenia made the restoration of territorial integrity within the internationally recognized borders of Azerbaijan inevitable through military and political means. As a result of the victory of the Muzaffar Azerbaijani Army in the 44-day Patriotic War, Azerbaijan implemented the decisions and resolutions of international organizations

demanding the complete, immediate and unconditional withdrawal of the Armenian occupying forces from the occupied territories of Azerbaijan and calling for the resolution of the conflict based on the norms and principles of international law, the 30-year occupation was ended (44-day Karabakh war: reasoning and results, 2021).

The victory of our brave Army under the leadership of President Ilham Aliyev, the victorious Commander-in-Chief of the Armed Forces of the Republic of Azerbaijan in the Second Karabakh War, and the liberation of the occupied lands are written in golden letters in our history. Along with the valor and heroism of the Azerbaijani Army, the wise and courageous diplomacy of President Ilham Aliyev is of particular importance in achieving this victory. This diplomacy was a continuation of the wise and visionary policy and diplomatic successes of National Leader Heydar Aliyev.

After the signing of the tripartite ceasefire agreement on November 10, 2020, Armenia's attempts to describe the saboteurs and terrorists arrested for their provocative behavior as "prisoners of war" have been proven to be groundless. However, based on the principles of humanism, Azerbaijan returned a large number of Armenian soldiers to Yerevan.

Three important factors were behind Azerbaijan's victory in the Second Karabakh War, which lasted 44 days: the tactical-mechanical superiority of the army, the dedication of the Azerbaijani people, and the diplomatic institution, which has reached a competent position over decades. After the end of the war, the most challenging to the Karabakh regime are the alliances and relations established by Azerbaijani diplomacy. Thanks to the legacy of the network of relations established by the diaspora in the 20th century, Armenia, which achieved great success in the diplomatic field, is today stuck between Russia and Iran. On the other hand, the relations established by Azerbaijan on pragmatic and rational bases from Washington to Moscow, from Tel Aviv to Islamabad play the highest role in crowning the victory of the Azerbaijani army.

The years 2020–2023 are remembered by a number of successes achieved by Azerbaijan in the military, political and diplomatic fields. In 2020–2023, the country strengthened its positions in the mentioned areas and managed to protect its national interests. In the last year, Baku has succeeded in exposing the aggressor on an international scale by skillfully highlighting the large-scale war crimes, vandalism and destruction committed by Armenia in the former occupied lands of Azerbaijan for nearly 30 years, as well as during last year's 44-day war. Azerbaijan has provided comprehensive and objective information to the world community by organizing the visits of foreign officials, parliamentarians, well-known mass media and non-governmental organizations, representatives of religious communities to the territories liberated from occupation. he was actively working on the bitter consequences of his refusal to give. The Ministry of Foreign Affairs presented a special draft resolution to the UN in this regard and put serious pressure on Yerevan and forced it to hand over some of the mine maps to Azerbaijan through the mediation of the United States, Russia and the European Union.

Azerbaijan has also taken practical steps in the legal framework to refer Armenia to international courts such as the European Court of Human Rights (ECHR) and the International Court of Justice (ICJ). The fact that the ICJ asked Armenia to take urgent measures to prevent the violation of the rights of Azerbaijanis can be considered as the country's next diplomatic success.

The relevant measures carried out by the Azerbaijani army forced Armenia to agree on the delimitation and demarcation of the state borders with Azerbaijan. After the 44-day war (2020), the political, diplomatic and military activities of Azerbaijan made the world's superpowers and major international organizations accept the new political reality in the region (Galandarli, 2021). As a result of Azerbaijan's diplomatic efforts, leading international states and organizations supported Azerbaijan-Armenia negotiations on delimitation and demarcation of borders, solving humanitarian problems, and restoring communications.

Contrary to Yerevan's expectations, Russia and France, as well as the European Union, accepted the new geopolitical realities formed by the tripartite declaration of November 10, 2020, after Azerbaijan's

military victory in the 44-day war. On June 15, 2021, during the visit of Turkish President Recep Tayyip Erdogan to Shusha, the signing of the Shusha Declaration on Alliance Relations between Azerbaijan and Turkey opened a new page in bilateral relations as one of the most important political events of the year (Galandarli, 2021).

Azerbaijan is in a historical and principled position unlike its other two neighbors in the South Caucasus. It is not completely thrown towards the West like Georgia, nor is it closed and under the military, political and economic yoke of Russia like Armenia. Moreover, after gaining independence with its natural resources and labor force, it has gained the opportunity to conduct a more independent, more impartial and more rational policy than its neighbors. Diplomatic institutions played a role similar to the role played by the Azerbaijani army in changing the status quo in Karabakh in this change and in protecting the interests of the country. Despite the fact that the Armenian diaspora scattered around the world has established close relations with the local authorities over the years, Baku had no difficulty in accepting its victory by the international community.

**Conclusions.** The development and implementation of the balanced foreign policy of the Republic of Azerbaijan, which serves to protect its national interests, is generally connected with the name of national leader Heydar Aliyev. It was thanks to his sense of statesmanship, deep logic, ability to deeply understand the essence of issues that it was possible to determine the right way to approach the establishment of international relations. Also, the modern foreign policy of the Republic of Azerbaijan, implemented under the leadership of Ilham Aliyev, shows its commitment to the course of comprehensive development of all goodwill and mutually beneficial relations (founded by Heydar Aliyev). The diplomatic activity carried out within the framework of this complex and multilateral process consists of several main directions, and all of them together constitute the foreign policy of independent Azerbaijan.

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## THEORY AND IMPROVEMENT OF PSYCHOLOGY

DOI <https://doi.org/10.30525/2592-8813-2024-1-25>

### IMPACT OF WAR ON THE MENTAL HEALTH OF ADOLESCENTS

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**Abstract.** In the current context of war, adolescents are in a particularly difficult psychological state, where stressful situations can significantly affect their development, functioning and lifestyle. The article presents the results of an empirical study of the impact of war on adolescents' mental health. It is stated that adolescents are particularly sensitive to the impact of negative socio-psychological factors on the determination of physical and mental health. It is noted that adolescents experiencing war are subjected to a great psychological burden, which can cause the emergence of various psychological problems, such as anxiety, constant fear, depression, aggression and others. It was found that the majority of adolescents do not have depression and it is not expressed at all at a severe level. One third of respondents experienced a deterioration in their emotional state during the war. This indicates that adolescents react to negative events quite painfully. It has been determined that resilience is a favourable component for maintaining the psychological well-being of adolescents and a protective mechanism against unforeseen threats throughout. It is proposed to introduce a special training programme for emotional recovery and psychological support for adolescents.

**Key words:** war, mental health, adolescents, trauma, depression, resilience.

**Introduction.** Military conflicts always have a negative impact on the psychological well-being of people, but adolescents are a particularly vulnerable category. The experience of traumatic events, loss of loved ones, evacuation, instability and uncertainty of the future in the context of hostilities can cause deep psychological disorders in adolescents and make it difficult for them to go through this important stage of personal development. The full-scale war in Ukraine creates exactly such destructive conditions for the development of adolescents. Therefore, constant monitoring of changes in the psyche of the younger generation and work to minimise risks is an urgent task in the context of modern warfare. This is a complex challenge for society, which requires fundamental changes in many areas to preserve the mental health of young people and the future of our country as a whole. Some practical experience of working with these adolescents has been gained over time, but comprehensive empirical studies of the impact of war on their mental health are still lacking. There is a need for an empirical study of the psychological problems of adolescents in wartime and the extent to which military conflict affects various areas of their mental health.

That is why in this article we aim to analyse the psychological problems typical for adolescents in war and to investigate the extent to which military conflict affects various areas of their mental health.

**The main part.** Before the war, the causes and consequences of psychological trauma on children's psyche were discussed mainly in relation to children and adolescents in residential institutions. The danger of psychological trauma was seen in the fact that in adulthood they would have difficulties with socialisation, adaptation and communication. Indeed, childhood trauma is the beginning of depressive disorders that can lead to personality destruction.

According to World Health Organisation statistics, 10% of people who have experienced a traumatic event will eventually develop symptoms of psychological trauma. Another 10% will experience behavioural changes or mental disorders that interfere with normal functioning in everyday life.

The results of an international mental health survey conducted in August 2023 in 11 countries and presented at the Third Summit of First Ladies and Gentlemen show that adolescents aged 13–15 are the most vulnerable to the impact of the war in Ukraine and global conflicts.

The danger of this age is a radical perception of what is happening around you. And this is understandable, because a person has just taken the first steps into the adult world, and he or she is met with such a difficult reality. The fear of losing everything you have – life, family, home, friends – increases. All this can provoke dangerous behaviour, auto-aggression (i.e. anger at oneself, which sometimes manifests itself in injuries to the body) or even suicidal thoughts in a teenager.

War, of course, affects a child's psyche. First of all, it is reflected in anxiety. No one prepared teenagers for the war and how to perceive current events. Children are constantly in tension because they do not know what to expect tomorrow. They have breakdowns, tantrums, disobedience, and fights with other children. The second important point is socialisation. Currently, children are deprived of this, and they need communication with their peers. Its absence or insufficient amount is expressed in the need to be heard, to feel their importance and to express themselves as a person.

Most scholars rightly point out that children face two types of traumatic events during war: unexpected traumatic events and long-term adverse events that lead to the emergence of unproductive coping strategies. As a result, adolescents are much more likely than their peers without war experience to suffer from such problems as anxiety disorder, post-traumatic stress disorder, depression, dissociative disorders (voluntary social isolation, depersonalisation, derealisation, unwillingness to talk, catatonic syndrome), behavioural disorders (including aggression, antisocial and criminal behaviour, and a tendency to violence), and are more prone to alcohol and drug abuse.

The most common consequences of traumatic experiences are anxiety, depression and psychosomatic illnesses (Wenger, & Yastremska, 2016). Thus, a significant number of people face long-term mental health problems after experiencing trauma.

Every person reacts differently to stressful situations. There is a certain optimal level of stress that mobilises the body and increases productivity (eustress). However, when the critical level is exceeded, exhaustion and a decrease in efficiency occur (distress). The consequences of stress depend on the individual significance of the traumatic situation for a particular person and the development of their psychological defence mechanisms (Gerasimenko, Skrypnikov, & Isakov, 2023). The most dangerous is not very strong but prolonged stress. A short-term intense crisis can mobilise the body's resources, after which all indicators return to normal. Instead, not very intense but long-term stress.

Changes in adolescence are rapid, encompassing both physical and mental spheres (Jaworska, & MacQueen, 2015).

According to scientists, adolescents are particularly sensitive to the impact of negative socio-psychological factors on the determination of physical and mental health because they have not formed or have poorly developed mechanisms of psychological self-defence.

During adolescence, an individual style of coping with stressful situations has not yet been formed. Adolescents use strategies suggested by their environment and do not yet prefer any particular one. However, in older adolescence, models of seeking social support and aggressive behaviour begin to prevail. This is a transitional age when the behavioural vector can easily change towards adaptive or maladaptive behaviour. Therefore, adolescents need timely external assistance that strengthens their internal and external resources and promotes flexible, socially adaptive behaviours.

Modern psychological research pays particular attention to the long-term impact of war on adolescents. Sudden traumatic events or prolonged adverse conditions can lead to unproductive behavioural patterns. Typically, adolescents experiencing war suffer from stress, depression, anxiety disorders,

and a loss of sense of identity. They often withdraw into themselves, deliberately isolate themselves from society, or engage in antisocial behaviour as a maladaptive response. All of these manifestations are normal reactions to abnormal events (Joshi, & O'Donnell, 2003).

Internal and external challenges for adolescents as a result of the war provoke feelings of fatigue, powerlessness, anxiety, and anger (Stoliarchuk O. et al., 2022).

Research by the analytical company Gradus Research states that 75% of children show symptoms of mental trauma due to the military conflict in Ukraine. Out of these 75%, one in five children has sleep disorders, and one in ten has a decreased desire to communicate, nightmares and memory impairment. As a result, these conditions further lead to social maladjustment, and in more severe cases, to mental disorders due to dysregulation of mental functions. Researchers have concluded that children who have experienced an event that had a strong impact on their mental state are more likely to develop post-traumatic stress disorder than adults (Ukrinform, 2022).

In the case of the development of post-traumatic stress disorder on the background of excessive stress or anxiety, the following symptoms can be diagnosed: hyperexcitability, insensitivity, avoidance, repeated experiences (intrusions) (Titarenko, 2018; Shebanova, 2021).

Adolescents who survived the war are characterised by anxiety, post-traumatic stress disorders, depression, dissociative disorders (voluntary social isolation, depersonalisation, derealisation, unwillingness to talk, catatonic syndrome), behavioural disorders (aggression, antisocial and criminal behaviour, and a tendency to violence).

However, psychologists advise not to perceive adolescents exclusively as passive victims of war, as they are members of society with their own active life position and are able to make their own decisions, create their own survival strategies (Dupuy, & Peters, 2010), show resilience in adverse conditions (Jones, 2013; Ferrari, 2013) and become full-fledged people despite the circumstances.

**Methodology and organisation of the study.** The study was carried out using a set of methods «Psychological Health of Adolescents in War» which included diagnostic techniques aimed at studying various aspects of adolescent psychological health. The survey was conducted using Google Forms.

The Bechterelev Depression Scale questionnaire was used to diagnose depressive states in adolescents (Zlyvkov, Lukomska, & Fedan, 2016).

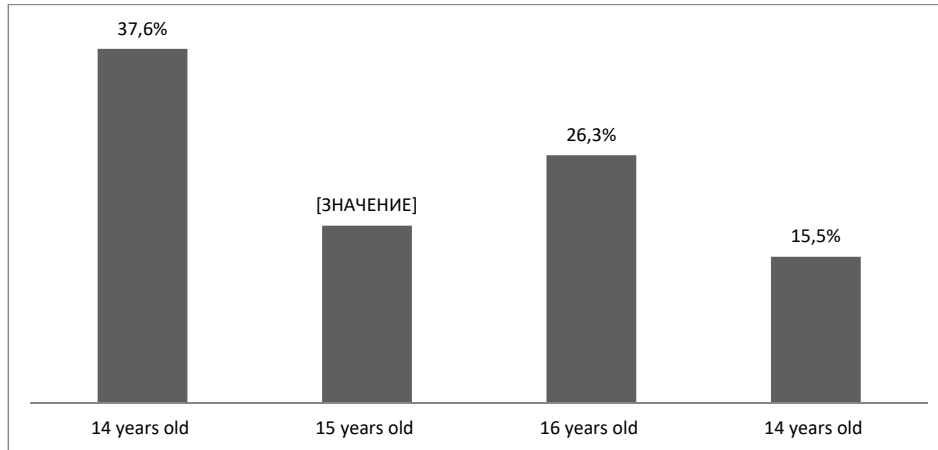
In addition, in order to make the study more accurate and thorough, the questionnaire «The Impact of War on the Occurrence of Depression in Adolescents» was developed, which consists of 12 questions, including 8 test questions and 4 detailed questions. Some of the questions are mandatory and some are optional. The questionnaire was created to understand how the onset of depression is related to how closely the war affected a particular respondent. For example, it helps to find out what was the reaction of a particular individual to the beginning of a full-scale invasion, his or her emotional state when mentioning and discussing military topics, the presence or absence of relatives, friends, acquaintances who are (or were) involved in military operations or who they lost as a result of the war. In addition to this information, the questionnaire allowed us to study other, equally important information that was useful for a more complete interpretation of the results obtained, which are related to the previous methods.

The mathematical processing of the survey data was carried out using the SPSS software package (version 26.0) by calculating the average and percentage values of the diagnostic values. The study was conducted in May 2023.

The study involved 443 adolescents from educational institutions in different regions of Ukraine. Of these: 46.7% – boys, 53.3% – girls.

The age distribution of adolescents is shown in Figure 1. It is worth noting that 1.8% of respondents did not indicate their age. Accordingly, at the time of the survey, all respondents were in the country.

**Results of the study.** First, let us analyse the results of the study aimed at identifying depressive states of adolescents.



**Fig. 1. Distribution of respondents by age**

The data presented in Fig. 2 show that 16.6% of the respondents have mild depression, of which 85.7% are female and only 14.3% are male.

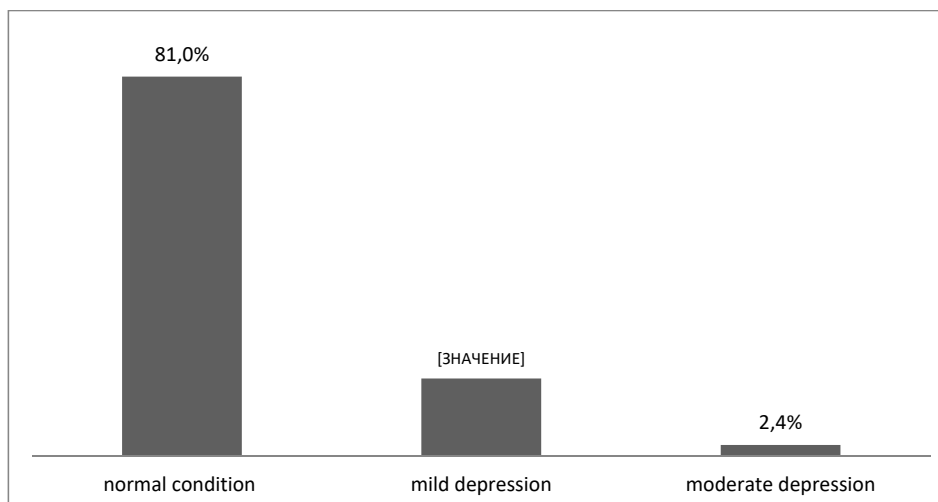
A moderate level of depression is present in 2.4% of the respondents, among whom there are only women. The onset of depression in these individuals may be caused by the fact that they repeatedly heard the sounds of explosions, spent a long time or temporarily stayed in areas where active fighting was taking place, and some even got directly into the explosion zone.

The majority of those with mild or moderate depression, namely 62.5%, continue to live in the war environment, i.e. they either did not change their place of residence or moved to another region of our country, having acquired the status of internally displaced persons.

27.5% of respondents lost relatives, friends or acquaintances as a result of the war, 2.5% lost their homes, and 50% changed schools. All these facts had a significant impact on the onset and development of depression in adolescents.

The rest of the study participants, who make up 81%, do not have depression, and none of the respondents have severe depression.

With the help of the questionnaire "The impact of martial law on the onset of depression in adolescents", we also learned many important aspects related to the war about the subjects. Their reactions to the beginning of the full-scale invasion of Ukraine were mostly that they were afraid, upset,



**Fig. 2. Expression of depression levels in adolescents**



surprised, in a state of shock, and some adolescents said they felt despair, hatred of the enemy and a lack of understanding of what would happen next. 41.9 per cent of respondents had to leave and then return to their community because of the war, 28.5 per cent moved to another region of Ukraine, and 29.6 per cent stayed in their community permanently. When fleeing the war, the individuals who took part in the study found refuge abroad in Poland, the Czech Republic, Germany, Italy, Spain, the United Kingdom, Canada, and the United States.

It is also worth noting that the emotional state of 23.8% of respondents worsened during the war, 19.1% remained unchanged, 45.2% changed several times in positive and negative directions, and only 11.9% improved. Therefore, as of today, compared to the beginning of the war, 38.1% of respondents have no different attitude towards it. The adolescents argued that the war is not over yet, it continues, and because of it a large number of people continue to die for their homeland every day; that they have now seen and understood what a real war is and what its consequences can be; that they could not have imagined that the hostilities would last for such a long time; that although they are not in Ukraine now, they have relatives, friends, acquaintances here, for whose fate they are very worried.

Another 38.1% of the survey participants had changed their attitude to the war. They explained this by the fact that they have become accustomed to war and it does not cause the same fear as before; that they have become more patriotic and are convinced that victory will be Ukraine's and will happen very soon; and that many people have changed their minds about the war because they have either moved to more peaceful Ukrainian territories or emigrated abroad. However, it is noteworthy that another 23.8% of respondents have not changed their attitude to the war.

The most frequent answers to the question of whether children feel fear and anxiety when reading disappointing news about the war or when it is mentioned were «yes» and «partly», which means that the war does have a significant impact on the mental state of adolescents.

Music (38.9%), computer and phone games (45.6%), communication (38.6%), the Internet (49.1%), walks (34.4%), and sports (31.3%) are the most common distractions from bad news, anxiety, and worry. In this context, they also mention learning foreign languages and studying, reading, and spending time with four-legged friends. Teenagers say that they are inspired by people, and when they are in a bad mood, they can be comforted by music and conversations with friends. At the same time, 36.5% of young people found it harder to find friends during the war.

When asked «Who is their support?» adolescents said the following. 81% of respondents consider their parents to be their support now, and for 55%, their parents are role models. Half of the adolescents (50.9%) look up to the military, and a quarter (24.4%) to volunteers. Teachers are more likely to be role models in such times (11.3%).

69.7 per cent of adolescents are motivated by events in their home country to help the Armed Forces in bringing victory closer. Children do this in a variety of ways: they weave camouflage nets for the army, make trench candles, participate in charity events, organise fairs, buy and send food to the frontline through volunteers, etc. Such work helps to improve the psychological state of 76.2% of respondents.

Thus, it can be concluded that adolescents react to negative events in a rather painful way.

Of course, prolonged exposure to such negative and destructive emotions and feelings does not lead to positive outcomes. Often, this is a serious blow to emotional, mental and physiological health and, as a result, contributes to the loss of moral strength and the emergence of depression.

In this regard, professionals are faced with the task of providing these children with adequate support and assistance so that these wounds can heal.

According to researchers, resilience is a favourable component for maintaining the psychological well-being of adolescents and a protective mechanism against unforeseen threats throughout life (Khanlou, & Wray, 2014).

According to N. Frolova, N. Hrysenko, H. Ilina, the course of the identity crisis characteristic of adolescents is determined by the degree of self-determination and national self-awareness. The

authors proved that adolescents with a high level of national self-awareness have a high psychological potential of the personality, in particular: resilience, life awareness and self-actualisation (Frolova, Hrysenko, & Ilina, 2016).

During adolescence, stress is common and can affect adolescents more than adults. Each adolescent has their own unique response to stress and their own characteristics in responding to stressful situations, and it is important to provide them with support and assistance to manage stress effectively. Stressful situations can be managed, and its negative impact on an adolescent's physical and mental well-being can be reduced by using external and internal resources. Building resilience and effective coping skills is important to support adolescents in their psychological development and well-being.

That is why it is important to ensure safety and stability in the space where adolescents are. This can be achieved by creating a favourable physical and emotional environment. They should be given the opportunity to maintain a normal daily routine, comfort, and encouraged to develop healthy habits such as good nutrition, physical activity and adequate sleep, etc. It is also important to provide adolescents with the opportunity to share their feelings and thoughts by creating a safe place for them to express their emotions.

In addition, adolescents need to learn effective stress management strategies. War can lead to increased anxiety and feelings of helplessness. Informed parents can provide adolescents with relaxation and meditation skills to help them calm down and de-stress. It is also important to teach them time management, prioritisation and decisiveness skills to help them feel more in control of their lives.

It is important to provide adolescents with support and recognition. Adolescents experiencing war may feel vulnerable and alone. The environment can foster a sense of community by providing opportunities to participate in group activities that promote cooperation and compassion. It is also important to support positive self-esteem by emphasising their achievements and positive traits.

At the same time, adolescents need to learn effective communication skills. They may experience stress and conflict in their relationships with others. Conflict resolution training can help teach adolescents how to listen to others, express their feelings and opinions, and build healthy relationships with others.

Overall, it is important to remember that adolescents are a vulnerable group, especially in times of war. They should be provided with practical guidance and support to build resilience and reduce stress. Creating a safe environment, teaching effective stress management strategies, providing support and acceptance, and developing communication skills are just a few of the ways in which psychologists can help adolescents improve their psychological well-being and adaptation to military conflict.

The data obtained indicate the expediency of developing a special training programme for emotional recovery and psychological support for adolescents, taking into account individual psychological indicators of affective disorders in adolescents and selected technologies for the development of such qualities as flexibility, agility, strength and resilience of character, as well as the ability to adapt to functioning in different external conditions. There is also a need for more intensive educational work with adolescents on mental health in general, the impact of full-scale war on it and the means to support it.

**Conclusions.** Thus, the above issues highlight the importance of providing psychosocial support and assistance to adolescents experiencing war. Early detection of psychological problems, psychosocial support and access to psychological services can contribute to the preservation of adolescents' mental health. Thus, the study can serve as a basis for psycho-correctional work with problem areas of adolescents, such as emotional and self-awareness. The purpose of such sessions is to transform emotional stress and anxiety into a search for self-supportive activity of adolescents. It is important to show adolescents the importance of different situations and actions in their lives not only for external

evaluation, but also for increasing the content of their own self-images, finding criteria for assessing themselves and the situation, and thus increasing their capabilities.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-26>

## THE ROLE AND SIGNIFICANCE OF EMOTIONAL INTELLIGENCE IN PROVIDING FUTURE PSYCHOLOGISTS' PROFESSIONAL RESOURCEFULNESS

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**Abstract.** The article is devoted to highlighting the role and significance of emotional intelligence in the structure of future psychologists' professional resourcefulness. To achieve this goal, the paper provides a brief overview of the theoretical-phenomenological model and presents a generalized analysis of some results from the research on psychological features of resource provision for future psychologists' professional development. Specifically, the results of correlation and factor analyses are presented, demonstrating the crucial role of emotional intelligence components, such as emotional awareness, empathy, managing the emotions of other people, and self-motivation, in ensuring the professional resourcefulness of psychology students. This significance was verified by establishing correlations and interdependencies between the investigated properties and the self-assessment of the professional development level. We identified that respondents with a high self-assessment of professional development level possess well-developed emotional intelligence, which serves as a guarantee for the success of their professionalization. In contrast, psychology students with a low self-assessment of professional development level exhibit significantly lower values in indicators of emotional intelligence and its components, and the structure of their factors is diffuse. This confirms the importance of developing emotional intelligence in future psychologists during their professional training.

**Key words:** emotional intelligence, resource provision, professional development, professional resourcefulness, future psychologists, self-assessment of the professional development level.

**Introduction.** In the context of transformative changes and collective trauma that Ukrainian society is experiencing today, there is a pressing need for high-quality professional training for socio-economic professionals. An important role in this is played by the cultivation of the future psychologists' professional resourcefulness, psychological resistance to traumatic events, self-effectiveness, and the ability to overcome emotional contagion when working with complex clients.

A key characteristic in the structure of such professional resourcefulness is the development of emotional intelligence and its components. In addition to the ability to empathize in working with trauma, every professional psychologist needs to be able to manage their own emotions, track their experiences and feelings, and determine the level of their psycho-emotional readiness to work with individuals who have become direct participants or witnesses of traumatic events. Therefore, the development of these mentioned qualities during the stage of obtaining higher psychological education plays a significant role in the professional development of future psychologists and ensures their professional effectiveness.

It is worth noting that the issue of professionalization of socio-economic professionals, particularly psychologists in Ukraine, has been investigated by researchers such as V. Andrushchenko, V. Kremen, H. Kostyuk, S. Maksymenko, L. Orban-Lembryk, N. Poviakel, O. Kokun, V. Shtyfurak, V. Pedorenko, O. Shamanska, O. Bondarenko, S. Vaskivska, Zh. Virna, V. Vlasenko, L. Dolynska, O. Dusavytskyi, P. Hornostai, O. Ivanova, V. Panok, Yu. Prykhodko, L. Umanets, N. Chepelieva, T. Shcherbakova, and others.

Various aspects of the professional training of future psychologists in the system of higher professional education have been explored by O. Bondarenko, O. Varfolomieieva, N. Kolomynskyi, L. Mova,



H. Radchuk, I. Andriichuk, N. Shevchenko, and others. The determination of professionally significant properties and criteria for the professional suitability of future psychologists has been addressed by N. Poviakel, N. Surhund, O. Cherepiekhina, S. Shandruk, T. Yatsenko, V. Shulha, V. Pedorenko, V. Shtyfurak, and others.

Special attention is given to studies on emotional intelligence as a professionally important trait for medical professionals and other representatives of socio-economic professions in the works of M. Shpak & V. Slavopas, S. Kasianovoi, H. Zakharchynoi & S. Hladun. The role and development of emotional intelligence in the professional education process have been highlighted in research conducted by N. Zhyhailo & M. Stasiuk, Yu. Breus, V. Zarytska, L. Kolisnyk, O. Myloslavska, I. Andreieva, S. Derevianko, O. Vlasova, N. Moriarti & A. Furman. The investigation of emotional intelligence as a professionally important trait for future psychologists has been carried out by T. Zhvaniia, O. Volkova, S. Derevianko, O. Ichanska, A. Zakrevska, N. Diomidova, O. Amplieieva, I. Voitsikh, and others.

The general aspects of the professional development of individuals among foreign psychologists have been illuminated by F. Parsons & H. Münsterberg, Z. Freud, W. Moser, E. Roeh, A. Maslow, H. Thome, H. Ries, P. Zieler, D. Tiedemann, E. Ginzburg, D. Super, and W. Jade. Works by B. Okun, A. Adber, M. Buber, L. Walberg, L. Biuhental, E. Kennedy, K. Shnaider, L.-E. Nastasa & A.-M. Cazan, N. S. Elman, W. N. Robiner, J. Illfelder-Kaye, A. I. Sheikh, D. L. Milne, B. V. MacGregor, and others are dedicated to the study of personal qualities necessary for a psychologist to carry out professional activities. Classics in the field of emotional intelligence theories include H. Gardner, J. Mayer & P. Salovey, D. Goleman, R. Bar-On and D. Caruso.

However, in none of the previously mentioned studies was the role of emotional intelligence in resource provision for future psychologists' professional development highlighted, making this issue relevant in the scientific discourse.

**The article aims** to determine the significance of developing emotional intelligence in the structure of professional resourcefulness of future psychologists and its role in resource provision for their overall professional development.

**The main part.** The exploration of emotional intelligence and the introduction of this issue into the scientific discourse were initiated by the American psychologist H. Gardner. In his 1983 monograph "Frames of Mind," Gardner expressed the idea of the necessity to reconsider the understanding of the concept of intelligence. H. Gardner proposed the existence of multiple intelligences, including verbal, logical-mathematical, spatial, kinesthetic, musical, and emotional intelligence. According to his classification, emotional intelligence is divided into interpersonal and intrapersonal (Gardner, 1983). The former defines an individual's ability to effectively interact with others, while the latter pertains to the capacity for self-realization, self-actualization, and success in life (Rakityanska, 2018).

H. Gardner's reflections prompted other scholars to pay attention to emotional intelligence as an independent phenomenon in the mental life of humans. The concept of emotional intelligence was introduced into scientific circulation by psychologists J. Mayer and P. Salovey in their articles in 1990 and 1993. In these works, the researchers proposed their understanding of this new scientific concept. Specifically, J. Mayer and P. Salovey defined emotional intelligence as a subtype of social intelligence, integrating the ability to control both one's own and others' emotions, differentiate them, and use this information to manage the thinking and actions of other people (Mayer & Salovey, 1993). The scientists proposed a model of emotional intelligence classified as an ability model, as they believed that the defined psychological property comprises a set of human abilities, including 1) perceiving, appraising, and expressing emotions, 2) using emotions to facilitate thinking, 3) understanding and analyzing emotions, and 4) emotionally regulating oneself reflectively (Mayer & Salovey, 1997).

It should be noted that the model proposed by J. Mayer and P. Salovey is foundational in the theory of emotional intelligence and is recognized as the most scientifically grounded and practical for application (Kanesan & Fauzan, 2019).

The popularization of the concept of emotional intelligence was facilitated by the book of the same name written by D. Goleman in 1995, which quickly gained widespread popularity worldwide. The author of the bestseller justified the significance of emotional intelligence in achieving personal and professional success (Rakityanska, 2018). By the term itself, the researcher meant an individual's ability to understand their emotions and the emotions of others to use this information to achieve personal goals (Goleman, 1995). In his book, D. Goleman also provided specific recommendations for emotional intelligence development. The psychologist argued that general intelligence plays an important role in an individual's career development up to a certain point. Over time, this individual-psychological disposition loses its significance in ensuring personal success, both in professional activities and in the social environment as a whole. Using empirical data, D. Goleman demonstrated that 85% of managerial effectiveness is determined by the emotional intelligence coefficient, while only 15% is attributed to the general intelligence coefficient. Furthermore, the researcher is convinced that emotional intelligence can be developed at any age (Rakityanska, 2018).

D. Goleman's model of emotional intelligence is termed a mixed model, the initial version of which included five constructs with twenty-five components of emotional intelligence. Later, in 2001, the psychologist proposed a model with four components that integrated twenty elements of emotional intelligence. D. Goleman categorized these four main dispositions as self-awareness, self-management, social awareness, and relationship management (Goleman, 2001) (Kanesan & Fauzan, 2019).

Another mixed model of emotional intelligence is the one proposed by R. Bar-On in 1997. The researcher defines emotional intelligence as a set of abilities that enable a person to act successfully. R. Bar-On identified five components, further divided into subcomponents, characterizing the structure of emotional intelligence. These components include 1) self-awareness (consciousness of one's emotions, self-confidence, self-esteem, and self-actualization); 2) communicative potential (empathy, social responsibility); 3) adaptation abilities (problem-solving skills, overcoming difficulties, emotional lability); 4) anti-stress potential (stress resilience, self-regulation); and 5) general mood (optimism) (Bar-On, 1997).

The models we described are fundamental in contemporary scientific theory about emotional intelligence. As a result of their analysis, Ukrainian researcher A. Kostuk formulated a comprehensive definition of the concept of emotional intelligence. She interprets emotional intelligence as an integrative personal attribute arising from the dynamic unity of affect and intellect through the interaction of emotional, cognitive, conative, and motivational characteristics. It is directed towards understanding one's own emotions and the emotional experiences of others, facilitating the management of emotional states, subordinating emotions to reason, and promoting self-awareness and self-realization through the enrichment of emotional and social experience (Kostuk, 2014). The functional characteristics of emotional intelligence are represented by a system of emotional attitudes towards oneself as a subject of cognition, the surrounding environment, and other people. This finds its reflection in social interactions (Kostuk, 2014).

In most contemporary scientific studies, emotional intelligence is regarded as one of the leading factors contributing to an individual's success in life (Kostuk, 2014). S. Kasianova emphasized the importance of its development in socio-economic professionals, as their work often involves intensive interaction with other people (Kasianova, 2019). Researchers O. Ichanska and A. Zakrevska identify emotional intelligence and empathy as resources for the professional training of psychology students. They argue that the development of these qualities contributes to an increase in stress resistance among future professionals and, during professional activities, leads to establishing better and more productive interactions with clients (Ichanska & Zakrevska, 2019).

In the context of our dissertation research on the psychological characteristics of resource provision for future psychologists' professional development, we have defined emotional intelligence as one of the components of their professional resourcefulness. Along with it, we included in its structure analytical

thinking style, tolerance for uncertainty, creativity, motivation for a professional career named "service", constructive coping strategies, and adaptive defence mechanisms. Each of these elements in the theoretical-phenomenological model of the research served its function in resource provision. Since the goal of the proposed study is to highlight the role and significance of emotional intelligence specifically in the structure of the professional resourcefulness of future psychologists, let's briefly examine our concept regarding the interaction and interdependence of the investigated properties.

Professional resourcefulness, as defined by us, is the state of an individual where they feel professional self-worth, possess a high level of awareness of the professional internal resources necessary for successful professional activity, and are capable of acquiring, developing, and actualizing them. One of the important resources for ensuring professional resourcefulness is emotional intelligence and its components, including empathy. It holds particular significance in the professional development of future psychologists whose work is closely related to providing psychological assistance to traumatized clients or those facing complex life situations. The ability to empathize, recognize, and understand another person's emotional state, influencing it while maintaining calm and self-control, is crucial for the effectiveness of a psychologist in the practice of psychological counselling.

For the verification of the significance level of each element of professional resourcefulness, we introduced the concept of self-assessment of the professional development level. This concept integrates components such as reflection and assessment of one's current capabilities, abilities, and potential in the profession; the time perspective of professional development (the presence of a flexible plan or a project for one's professional development); motivational and value level of professional development (independent choice of the profession, motives for its selection, a deep interest in the profession); flexibility and adaptability (to labour market conditions, conditions of the professional activity itself); understanding of which properties/resources are necessary for professional development. This property is central in the theoretical-phenomenological model of the research and represents the formation degree in psychology students of professional identity, self-concept, and professional level of aspiration. The indicator of self-assessment of the professional development level allows us to indirectly determine the positive or negative modality of the professional self-concept.

The study hypothesis assumes that the higher the self-assessment of the professional development level, the higher the development level of professional resourcefulness components in future psychologists and vice versa. We tested this interdependence and mutual conditioning during our empirical research, the analysis elements of which are presented in this article.

**The methods.** We utilized seven psychodiagnostic methods in the original dissertation research on the psychological features of resource provision for future psychologists' professional development. Considering the topic and purpose of this article, we analyze the results obtained through the N. Hall's emotional intelligence test and the author's questionnaire for determining the peculiarities of self-assessment of the professional development level among psychology students.

Among the methods of mathematical statistics, we employed various techniques, including comparing the mean values of sample indicators, the Shapiro-Wilk test to assess the normality of the distribution of values in the sample, Spearman's rank correlation coefficient, the Kruskal-Wallis test to identify the significance of changes in indicators and differences between them, and factor analysis. All calculations were performed using IBM SPSS Statistics version 23 and Microsoft Excel 2013 software.

In the study, 197 students participated, including those from the full-time program specializing in Psychology, 2nd to 4th years of the Bachelor's degree, and 1st year of the Master's degree at Vinnytsia Mykhailo Kotsiubynsky State Pedagogical University (Vinnytsia, Ukraine) and Khmelnytskyi National University (Khmelnytskyi, Ukraine).

**The results and discussion.** In the initial stage of processing and summarizing the obtained results from the sample of psychology students, we identified that among the emotional intelligence compo-

nents, the highest scores were observed in emotional awareness (28.71). Conversely, the managing one's own emotions component has the lowest values (23.17). From this, we infer that at the cognitive and rational level, psychology students understand the importance of emotional intelligence in their professional activities and life in general. However, they appear to utilize this understanding minimally for the practice of emotional self-regulation in everyday situations. Additionally, they exhibit well-developed traits such as empathy (27.93) and managing the emotions of other people (27.54). Nevertheless, the difficulty in managing their own emotions indicates a certain weakness in the self-effectiveness of future psychologists and a tendency to distance themselves from their own emotional and sensory expressions.

Further processing of the results involved conducting correlation and factor analyses to determine the interrelation and interdependence between self-assessment of professional development level as an indicator of the formation of professional self-concept and identity, and the emotional intelligence components. This allowed us to establish the significance of emotional intelligence in the resource provision of future psychologists' professional development as an element of professional resourcefulness. To achieve this, we verified the normal distribution of values using the Shapiro-Wilk criterion, which determined the choice of non-parametric methods in mathematical statistics.

Thus, we have analyzed internal and external relationships between the measured indicators in the sample using the Spearman correlation coefficient. Internal relationships involve identifying correlations with the integral indicator of self-assessment of the professional development level.

As a result of calculating the Spearman correlation coefficient for the integral indicator of self-assessment of the professional development level, it was determined that it is most strongly associated with emotional intelligence components such as managing the emotions of other people (0.265) and empathy (0.238) (Table 1).

Table 1

**Spearman's correlation of “the self-assessment of the professional development level” indicator with the components of emotional intelligence**

EI Component	Correlation index
Managing the emotions of other people	,265**
Empathy	,238**
Self-motivation	,194**
Emotional awareness	,189**
Managing one's own emotions	,091

At this stage of the research, we can already observe that the most significant components of emotional intelligence in the structure of future psychologists' professional resourcefulness are the ability to manage the emotions of others and empathy. The latter trait plays a crucial role in establishing psychological contact, fostering an atmosphere of trust, and promoting understanding between the psychologist and the client. Additionally, the high self-assessment by psychology students of their ability to influence the emotions and experiences of others likely contributes to greater confidence in their professional competencies and effectiveness.

At the second level of significance, self-motivation and emotional awareness are found, determining the level of future psychologists' realization of the necessity to develop their emotional intelligence for achieving success in professional development, growth, and the practice of psychological counselling. The correlation between self-motivation and self-assessment of the professional development level may also indicate the ability of psychology students to evoke and sustain the emotions necessary for practical activities.



Among other correlation indicators, we also sought external relationships between diagnosed traits that had maximum significance, namely 0.4. From the indicators approaching the value of 0.4, we note the correlations: "emotional awareness" and "integral way of life" in professional career motivation – 0.388; "empathy" and "service" in professional career motivation – 0.376; "self-motivation" and "positive interpretation and personal development," a way of reacting to stressful situations – 0.370.

We explain the identified external relations with the following trends:

- emotional awareness of respondents may motivate them towards a more diverse life development rather than solely focusing on professional growth and career advancement. Substantial success in the professional realm sometimes entails significant workload and emotional stress, leading to rapid emotional and professional burnout. Therefore, the balance of individual life spheres and their diversity is crucial for emotional well-being and the opportunity for relief through activities beyond the professional sphere. In turn, the multifaceted development of personal identity and self-realization, along with the development of various aspects of private life, contributes to a more harmonious individual emotional development;

- the positive correlation between empathy and professional career motivation "service" reflects the dependence of humanistic views, belief in people, and interest in them on the emotional intelligence development in respondents. It demonstrates their capacity for empathy, understanding others' emotions, and the ability to delve into another person's emotional state. We consider such a connection as one of the significant elements in the professional resourcefulness structure of future psychologists and the resource provision of their overall professional development. Their professional activities demand a high level of engagement in the lives, experiences, and emotions of others, and the provision of quality and effective psychological assistance is impossible without psychologists having humanistic values and well-developed empathy in their moral-ethical structure;

- a high level of self-motivation as a component of emotional intelligence may determine respondents' ability to positively interpret problematic or stressful events in their lives and use them as a resource for personal development. Furthermore, advanced self-motivation signifies developed willpower, self-discipline, purposefulness, emotional regulation, and the ability to subordinate emotions to rational ways of understanding life events and problem-solving. In our opinion, this emotional intelligence trait is associated with a cognitive and constructive coping strategy in the results of respondents' diagnostics.

Finally, we computed the number of significant correlations for each measured indicator to identify the most "connected" and "isolated" indicators. As a result, we determined that the indicators of emotional intelligence components are among the most powerful in the professional resourcefulness structure of future psychologists. Specifically, the self-motivation indicator has 31 significant correlations with other diagnosed traits, empathy has 30, emotional awareness and managing the emotions of other people has 27, and managing one's own emotions has 23 (Table 2).

Table 2

**Measured indicators of the emotional intelligence components by the number of significant external connections**

EI Component	Number of significant connections
Self-motivation	31
Empathy	30
Emotional awareness	27
Managing the emotions of other people	27
Managing one's own emotions	23

Such a distribution of connections reflects the specificity of the sample of psychology students, where self-motivation and empathy are among the most powerful components of resource provision for their professional development. These results from the correlation analysis confirm the significance of emotional intelligence in the process of professionalization of future psychologists and its defining role in their professional resourcefulness.

For a more comprehensive understanding of the characteristics of emotional intelligence manifestation in the resource provision for future psychologists' professional development, let's examine the dynamics of its development in psychology students across different academic years.

We analyzed the average values of the indicators in the groups and found that in the vast majority of them, the dynamics were not direct, that is, based on the results, it is not possible to claim that the dynamics of most of the analyzed indicators has an increasing or decreasing nature or trend. On the other hand, from all values, we selected for analysis only those in which significant changes were recorded. The Kruskal-Wallis test was used to identify the significance of these changes. Among the components of emotional intelligence, noticeable changes were found in the dynamics of emotional awareness, self-motivation, and empathy (Table 3).

Table 3

**Distribution of average values in indicators of the emotional intelligence components  
by year of study**

<b>EI Component / year of study</b>	<b>2<sup>nd</sup> (bachelor)</b>	<b>3<sup>rd</sup> (bachelor)</b>	<b>4<sup>th</sup> (bachelor)</b>	<b>1<sup>st</sup> (master)</b>
Emotional awareness	28,88	29,43	27,24	30,23
Self-motivation	26,34	26,39	24,92	28,71
Empathy	29,02	27,63	26,77	28,65

From the presented values, we can observe a significant decrease in the indicators of the emotional intelligence components in the fourth year of the bachelor's program. In all emotional intelligence indicators, it is the lowest. This may indicate a specific characteristic of the respondents, particularly in the fourth year of the bachelor's program in our sample, where there is a lower level of development of emotional intelligence compared to cohorts from other years pursuing the same degree. However, this proposition cannot explain the peculiarities of emotional intelligence indicators for all fourth-year psychology students from different educational institutions. Therefore, we consider that such a trend should be interpreted with a focus on the dynamics of future professionals' professional development.

One explanation for such a decline in the indicators of emotional intelligence in fourth-year psychology students could be a general decrease in the level of motivation for learning. However, a more likely explanation in this case is the presence of somewhat lowered self-assessment of their professionally important qualities among fourth-year students. This could be attributed to a more constructive understanding of the standards and requirements of the professional activities of psychologists and an awareness of the need for further professional improvement.

This decline in indicators is also noticeable against higher values among younger psychology students. Here, we can hypothesize the presence of the Dunning-Kruger effect, in which individuals with lower levels of professional knowledge and skills directly associated with the year of study tend to have an inflated self-assessment of their professional abilities and qualities. On the other hand, the increase in the manifestation of emotional awareness, self-motivation, and empathy among students in the master's degree, in our opinion, is natural and regular. At this stage of professional education, most future psychologists have the opportunity to test their professional skills and determine their effectiveness in practice.

To confirm the interdependence between the emotional intelligence components and self-assessment of the professional development level, as well as their significance in the professional resource-

fulness structure of future psychologists, we conducted a factor analysis of the research results. Before this, we divided the sample of psychology students into groups based on levels of self-assessment of the professional development level, specifically into groups with low, medium, and high levels of manifestation of this trait. According to this, we conducted a comparative analysis of the indicators of respondents with low and high degrees of self-assessment of professional development level.

Using the Kruskal-Wallis test, we identified indicators where the mentioned factor had statistical significance. Among such indicators, the components of emotional intelligence – emotional awareness, self-motivation, empathy, and managing of the emotions of other people were determined (Table 4).

Table 4

**Xi-square statistics and significance of indicators of emotional intelligence components, which have statistically significant differences by factor**

EI Component	Xi-square	Degree of freedom	Asymptotic significance
Emotional awareness	8,023	2	0,018
Self-motivation	7,185	2	0,028
Empathy	10,93	2	0,004
Managing the emotions of other people	14,546	2	0,001

By comparing the average values of the identified indicators in groups with different self-assessments of the professional development levels, it was found that the group with a low level of its manifestation has significantly lower values of emotional intelligence components compared to groups with medium and high self-assessment. This allowed us to conclude that the indicators of emotional intelligence components are linearly related to the self-assessment of the professional development level of psychology students – the higher the self-assessment, the higher their manifestation (Table 5).

Table 5

**Comparison of mean values for indicators of emotional intelligence components, which have statistically significant differences by factor**

EI Component	Low level	Medium level	High Level
Emotional awareness	27,7	29,19	28,74
Self-motivation	25,1	26,23	27,64
Empathy	26,38	28	29,43
Managing the emotions of other people	25,24	27,81	29,4

Through the procedure of factor analysis, we have established that the first and most powerful component in the structure of factors in the group of psychology students with a high self-assessment of the professional development level is the emotional intelligence factor (more than 24% of the total variance), which incorporates four indicators – its components – empathy (0.889), management of other people's emotions (0.838), emotional awareness (0.765), and self-motivation (0.544). In individuals with a low self-assessment of the professional development level, these indicators were more "dispersed" across different components, indicating insufficient formation of emotional intelligence in general.

These results allow us to assert that the development of emotional intelligence and a high level of its manifestation directly contribute to the professional resourcefulness of future psychologists and promote the success of their professional growth. This trend is reflected in the high self-assessment of

the professional development level by psychology students, which determines a corresponding level of aspirations and a better understanding of the importance of forming and improving professionally significant qualities.

On the other hand, respondents who have a low self-assessment of their professional ability, suitability, and competence, as well as a poorly developed professional self-image, are characterized by a low level of emotional intelligence development and its components. This negatively affects the overall level of reflection on their abilities and potential in the profession.

**Conclusions.** Therefore, the theoretical analysis of the issue has demonstrated that most contemporary scholars identify emotional intelligence as one of the valuable individual resources for achieving professional and social success. Its development is also crucial for future psychologists. Abilities such as recognizing and understanding one's and others' emotions, managing them, self-motivation, and empathy play a vital role in ensuring psychologists' professional resourcefulness and their effectiveness in practical activities.

Within the scope of our dissertation research on the psychological features of resource provision for future psychologists' professional development, emotional intelligence was identified as one of the key structural components of professional resourcefulness. We examined its significance through the interrelation and interdependence with the central property in our theoretical-phenomenological and empirical models, namely, the self-assessment of the professional development level.

As a result of the conducted quantitative and qualitative analysis of the research results, we have confirmed that among the most significant components of the professional resourcefulness of future psychologists and the resource provision for their professional development, the following emotional intelligence components stand out: empathy, managing the emotions of other people, emotional awareness, and self-motivation. Within this sample of psychology students, the emotional awareness indicator has the highest values, indicating a high level of awareness of the necessity for developing their emotional intelligence as a professionally important trait and a generally vital ability. Additionally, the components showing the strongest correlations with the integral self-assessment of the professional development level are the indicators of managing the emotions of other people and empathy. This suggests that the professional interest of the respondents is reinforced by their people-centric and humanistic orientation, along with an understanding of the importance of emotional intelligence in working with people. Similarly strong is the correlation between the self-assessment of the professional development level and self-motivation, indicating the ability of psychology students to consciously alter their emotional states to ones conducive to practical activities.

In conclusion, factor analysis has allowed us to determine that, in the sample of psychology students with high self-assessment of the professional development level, the factor of emotional intelligence occupies the first place and plays a decisive role in ensuring their professional resourcefulness. On the other hand, respondents with low self-assessment of the professional development level exhibit low values of emotional intelligence and its components, which are scattered across various factors. From this, we can conclude that the development of emotional intelligence in future psychologists is critically important during the stage of their professional development, the formation of their professional self-concept, and the provision of professional resourcefulness.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-27>

## PSYCHOLOGICAL CONDITIONS FOR OVERCOMING PERSONAL TENSION IN CHILDREN FROM FORCEDLY DISPLACED FAMILIES

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**Abstract.** The military operations undertaken to safeguard the territorial integrity and sovereignty of the Ukrainian state against Russian aggression have caused many difficulties. As a result, a huge number of people forced to leave their homes due to the war suffer from feelings of fear and helplessness. This particularly applies to children. In the absence of timely, qualitative, and professionally administered assistance, being in a combat zone can be a traumatic event for children and have a lasting impact on their future lives.

Undoubtedly, children represent the linchpin of a nation's future. Only by promoting their development, providing a proper educational environment, creating favorable conditions for socialization, and overcoming existing difficulties can we hope for Ukraine's restoration, prosperity, happiness, and stability. Therefore, the theoretical justification and practical activities of psychologists regarding children from internally displaced families to overcome negative phenomena and create favorable conditions in their lives are urgent and relevant.

**Key words:** children from internally displaced families, PTSD, stress, psychological trauma, adaptation, psychological support, short-term psychological correction.

**Introduction.** During the war, many Ukrainians were forced to leave their homes and became internally displaced persons. Helping them understand their situation, adapt easier to new places, and cope with life difficulties is one of the tasks that can only be addressed with the help of psychologists. Both adults and children of migrants face daily challenges in adapting to new living conditions: until February 2022, migrants were treated as people who had survived hardship, and their fears remained in the past in peaceful territory, but now the problems are deeper. There is a full-scale war going on, and people, especially children, need help to adapt to today's realities.

The adaptation of migrants largely depends on the readiness of cities and villages to accept, help, understand, and support them as members of the community, not just as temporary residents. As a result, internally displaced persons can become part of the displaced community, integrating into the atmosphere of life in a new place and uniting with a common desire to overcome difficulties. A significant therapeutic factor for children-migrants experiencing separation from their familiar environment is the loss of their usual surroundings and a sense of vulnerability. Therefore, it is important to delve deeper into this issue and organize the work of psychologists in a long-term, effective, and, most importantly, result-oriented manner.

The issue of providing psychological support to children-migrants will remain relevant as long as the war continues in Ukraine, and even after its conclusion. The situation is characterized by ongoing combat operations, and the population of Ukraine continues to live under conditions of constant stress, with many children experiencing the consequences of post-traumatic stress disorder.

**The purpose of this article** is to discern the psychological determinants facilitating the resilience of children from internally displaced families in navigating personal distress. Drawing upon these insights, we endeavor to formulate a comprehensive corrective and developmental program, functioning as an instrumental tool to facilitate their reintegration into societal norms.

**The main section of the work.** In our scholarly estimation, restoring the mental health of displaced children is a crucial task for ensuring Ukraine's future. The situation of children today is very diverse and complex, especially psychologically. We must ensure that children feel that a happy childhood is a great value for us, adults. We must take into account the characteristics of the children's world, which is characterized by egocentrism. Children believe that everything happening around them is their own behavior, their own fault: "I must be doing something wrong if something bad happens".

Illustratively, a poignant vignette featuring an injured child seeking elucidation from their maternal figure, "Mom, why does it hurt so much? I listened to you," accentuates the idiosyncrasies of a child's perceptual reality. In acknowledgment of this distinctive cognitive framework, psychologists would judiciously communicate to a child confronting the aberrant experiential contours of wartime, asserting, "As adults, we are committed to exerting every conceivable effort to attenuate adversities expediently" (Novikova, 2016: 162).

Children want to be involved in the common cause – in our victory and the quickest possible end to the war. We must explain to the child that each of us has our own important work. Of course, the most important thing for children is to develop, learn, and acquire new skills. Analogous to the role employment plays in alleviating stress for adults, purposeful engagement emerges as an indispensable facet for children, aiding them in the structuring and navigation of their lives. The transformative potential of cultivating a sense of "I can do this" (self-efficacy) is underscored, wherein children surmount the deleterious state of helplessness emanating from an apparent inability to effect immediate change.

Collectively, a considerable majority of children in Ukraine, exceeding two-thirds, have undergone a forced dislocation from their habitual abodes, relocating to ostensibly secure environments and educational institutions of habitual attendance. Consequently, the experiential nuances of remote education acquired during the pandemic and ensuing quarantine measures assume heightened relevance, notwithstanding discernible differentiations.

As of March 14, 2022, the Ministry of Education and Science of Ukraine launched the project "All-Ukrainian Online School" with lesson plans in Ukrainian for pupils in grades 1–11 (Hrydkovets, 2018: 161). Online materials can be accessed by children remaining in Ukraine and those whose parents have taken them abroad to escape the war, and are currently residing in another country. Connection with educational institutions has been temporarily lost or destroyed due to enemy shelling and combat actions. In institutions where learning is being resumed remotely, children return to the educational environment and study with familiar teachers they have worked with for many years. However, some children only have access to asynchronous online services. Online services essentially serve as a compensatory function in emergency situations or as an additional educational resource. It is essential to understand that online education has psychological peculiarities in the development of children during the learning process, and special psychological phenomena become significant.

A crucial phenomenon in such distance education is the co-presence effect – simultaneous presence in a shared space, the disappearance of physical distance, and a connection beyond the screen reality to the physical reality of a child's life. The co-presence effect has been actively studied in the international psychological community since the beginning of the pandemic as a crucial factor for the productivity of remote work and distance learning. We believe that the asynchronous format adopted by schools does not provide the co-presence effect, although regular usage undoubtedly forms a couple of social effects.

In this regard, the question arises about the relevance of studying the impact of such effects on the development of children during distance learning. This is related to the fact that without under-

standing what is happening and how it affects a child's development, it is impossible to make the right choices for compensation and healing. Understanding that the stress of traumatic events reduces the probability of forming new cognitive units (knowledge, skills, habits), the urgency of spending more time on mastering the curriculum and meeting state standards, the need to change assessment principles, the necessity of developing a new attitude towards learning outcomes in wartime, the need for awareness of the need for a new attitude towards learning outcomes in wartime.

Educational reforms, guided by humanistic values and the reconstruction of heritage in post-totalitarian education, should continue to evolve considering the new realities of war and post-war reconstruction and its consequences, especially the psychological state of children and the psychological impact of distance education. The connection with a teacher, providing feedback on a child's intermediate results, individualizing instructions and tasks, considering the pace of achievements, providing emotional support is formed there.

Additionally, the video conference format allows children to see each other (at least partially, even if not all children have sufficient technical competence) and thus experience the effect of shared emotions. This socio-psychological effect is crucial for the formation of children's communicative skills, their emotional, spontaneous, and social development, and psychological recovery after stress. Since providing feedback and exchanging emotions are important features of synchronous distance learning, every effort should be made to return children to the format of synchronous distance learning with long-term relationships with teachers. In our opinion, even in the case of destroyed buildings, it is necessary to reconstruct educational institutions in a virtual distance format and provide teachers and students with the technical means for learning, without waiting for the physical buildings to be restored. This requires flexibility and restructuring of administrative rules and procedures. However, what once seemed impossible is now being resolved by the collective efforts of our societies. This applies to further educational reforms aimed at creating the best conditions for the psychological recovery and development of every child.

In the conditions of Russia's military aggression against Ukraine, the psychological exhaustion of displaced children occurs after prolonged periods of stressful situations. Personal structures and individual tendencies in reacting to military actions also play a significant role in the emergence of psychological breakdown. As practice shows, all individuals who have experienced war, forced displacement, repression, physical, or sexual violence require active psychotherapeutic assistance, even if they do not report their condition.

Research conducted with displaced children and internally displaced persons indicates that a considerable portion of fears in displaced children is related to stress-induced fear experienced in extreme conditions of forced displacement, often leading to post-traumatic stress disorder (PTSD). The PTSD symptom complex, induced by events beyond everyday life, manifests in refugee children as the fear of being destroyed. This fear, underlying various behavioral strategies in children of different ages caused by PTSD, ranges from compulsive repetition of traumatic situations to compulsive avoidance of anything related to trauma. The "fear of being destroyed differs from the typical fear of death in all children by reflecting the possibility of death here and now and forming an anxious attitude towards the world" (Berry, 2006: 48).

Fear manifests differently in various groups of surveyed children. Displaced children from Donetsk rarely reenact traumatic situations but more often use situations from mass media (television) that convey similar experiences. Conversely, displaced children from Mariupol demonstrate the "fear of being destroyed" through sudden re-experiencing of traumatic events. Compared to local children, internally displaced children show a higher level of overall life dissatisfaction. The most significant differences were found in class status and satisfaction with living conditions. In our opinion, the obtained data indicate the complexity of the socio-psychological adaptation of displaced children.



In the initial stages of the study, we formed open groups with all willing children. We assumed that children leaving the combat zone were in a state of shock and required psychological support. Structured psychotherapeutic sessions were conducted in open groups. Observing the participants and interacting with them, we identified the most traumatized children and started individual work with them.

Once the lives of displaced children became relatively stable, we began creating closed groups with a constant structure and fixed therapy duration. Psychotherapy followed a specific algorithm:

- Treatment duration: two months.
- Number of groups: four (two children's groups with participants aged 6–10 and two adolescent groups with boys aged 11–15).
- Number of participants in each group – 15–20.
- Session frequency for each group – twice a week.
- Session duration – two hours.

Participation in closed psychotherapeutic groups was based on the results of clinical and psychodiagnosics testing. Each group participant received an observation card, recording information about the child's condition at the beginning, middle, and end of treatment, as well as peculiarities of their participation in the group process.

We investigated the behavioral characteristics of displaced children that could indicate their adaptive capabilities. Most often, children use coping strategies such as “drawing something,” “writing,” “reading,” “hugging,” “pushing,” and “talking to someone” when faced with challenging situations. Meanwhile, “reflection “attempting to forget and “hitting, breaking, or throwing things” were the least common responses. The research results indicate that the behavior of this group of children is more focused on supporting social contacts and positive distraction, aligning with socially approved adult norms of behavior. The least attractive coping strategies are those directed towards passive distraction and introspective concern.

Children choose coping strategies such as “child's work” – drawing, writing, reading books, walks, running, or cycling – to replace unpleasant experiences with active activities. These strategies allow them to shift their focus to other types of child activities, associated with learning or other types of activities most familiar to younger school-age children. Of course, children still play a lot, engage in socially approved activities, and can count on understanding and praise from adults. In this way, children reduce their anxiety through specific physical and cognitive actions.

Refugee children tend to “cry”, mourn”, “hug” rub”, “caress” and “talk to someone” actively seeking support from outside. Giving preference to these strategies indicates sensitivity and submissiveness on one hand, and openness and dependence on the other. It is likely that displaced children feel safe when they use their inner resource of “conversation” and when there is a stronger person nearby who understands and reassures them. Such protective behavior brings security to most children.

Table 1

### Results of Coping Strategies Chosen by Children (%)

Coping Strategy	Children-Displaced (n=24)	Local Children (n=48)
1	2	3
<b>Reflexive care</b>	4.2%	10.4%
Think about it	–	10.4%
Stay alone, solitary	16.7%	23.0%
<b>Passive distraction</b>		
Sleep	–	2%
Dream or imagine something	16.7%	16.7%
Eat or drink	4.2%	4.1%

Continuation of the table 1

1	2	3
Try to forget	4.2%	20.8%
Try to relax, stay calm	21.0%	23.0%
<b>Destructive emotional expression</b>		
Hit, break, or throw things	4.2%	10.4%
Irritate someone	4.2%	2.0%
Cry and mourn	21.0%	18.7%
<b>Active distraction</b>		
Draw, write, or read something	16.7%	–
Walk around the house or street	–	4.2%
Walk, run, or ride a bicycle	12.5%	6.2%
<b>Social contacts for support</b>		
Hug and embrace familiar people, favorite things, and animals (e.g., dogs, cats)	16.7%	12.5%
Apologize or tell the truth	12.5%	10.4%
Talk to someone	16.7%	10.4%
Ride a motorcycle, ask parents, dream about an idol, feel difficulties	25.0%	–
Music, computer	12.5%	–

Local children, on the contrary, use strategies related to reflexive defense in their adaptive behavior; they more often use “reflection”, “talking to themselves” and “being alone”. Perhaps this reflects their social shyness and a focus on using passive coping strategies. Obviously, they are reflective and, therefore, less likely to concentrate on their problems, trying to forget about them as quickly as possible. Based on such protective behavior, it can be said that they are sensitive, somewhat closed, somewhat self-doubting, and dominant. In certain life situations, dominance intensifies, which can provoke aggressive behavior (strategies such as "hitting, breaking, throwing").

Analysis of data obtained using the “Anxiety” method (R. Temple, M. Dorky, V. Amen) to determine the level of anxiety shows that the average level of anxiety index in the children's sample is about 60%, corresponding to a high range of anxiety. The majority of children affected by military actions (over 2/3) have a high level of anxiety, and a small fraction (1/3) have a moderate level of anxiety. The distribution of anxiety among 6- and 7-year-old children is characterized by the same scale, style, and form. At the same time, gender differences in the level of anxiety among children displaced from the combat zone are evident.

Boys are a more emotionally vulnerable category of refugees than girls, with a higher average anxiety index ( $p < 0.05$ ), experiencing a higher level of tension, discomfort, negative emotions, and distress. At the same time, boys more often belong to the risk groups. Compared to girls, fewer boys experience a relatively low level of anxiety (below 40%), and more experience an extremely high level of anxiety (above 70%).

Diagnostic work was closely intertwined with correctional-developmental work and could not be postponed while waiting for the processing of diagnostic results. Therefore, a correctional-developmental program was implemented to activate the reserve of socio-psychological adaptation in children.

Group psychotherapeutic sessions were conducted by two psychologists, one of whom was the leader, and the other was the assistant. The session consisted of three parts:

1. Introductory part: the leader conducted a greeting ritual, followed by a group discussion of current problems proposed by the children themselves.

2. Main part: characterized by free creative activity of all group members. The leader and assistants participated in the activity of one or several participants, who were identified either by observation the day before the group work or at the beginning of the current session.

3. At the end of the session, the leader conducted a summary group discussion and a farewell ceremony.

Spontaneous games often emerged during sessions instead of the games proposed by the psychologist, reflecting the trauma that the children had to experience in real life. Trauma games were divided into three main types.

**Repetitive Types.** For example, M.A. (11 years old) repeated the following game in the first session: "Killing" a soft toy with a toy knife from a dish set and attacking it with cries of "I'll kill you!" During individual interviews, the psychologist learned that her brother died during the mass killings in Bucha in March 2022. Gradually, the girl stopped playing this type of game, and other repetitive games emerged. In these games, children not only projected their traumatic experiences but also expressed unmet needs.

**Unfinished Types.** A.V. (9 years old) constructed a house from building blocks but left it unfinished, calling it a "damaged house." Initially, the girl refused the psychologist's suggestion to build a house with a roof. After several sessions, she agreed to build a house with the psychologist, which turned out to have a roof and windows.

**Destructive Types.** I.K. (8 years old), after building an airplane with blocks, "bombed" the house that other children were building.

Often, two or three children spontaneously start a game, which other group members gradually join. For instance, M.D. (6 years old), who crafted a rocket launcher from blocks, simulated bombardment by throwing block pieces at other children. The entire group rushed to catch the "rocket launcher", leaving the "injured" psychologist to call for help. The children dressed as "doctors," removed "shrapnel" from the psychologist's body, bandaged him, and began a "surgical operation".

During psychotherapeutic sessions, the specificity of children's and adolescents' perception of traumatic time was confirmed. The emotional intensity of traumatic stress is proportional to their entire life up to that moment.

Thus, traumatic experience divides life into two parts – events that occurred before the war and events that occurred after the war. Regardless of the topic, children and adolescents always emphasize, "It was before the war," or "It was after the war." Many children and adolescents had an idealized perception of the pre-war past. While playing, children were constantly in the past or returned to the traumatic past.

Children and adolescents also had disrupted perceptions of the future. In our opinion, these disruptions include:

- Lack of imagination about the future.
- Thoughts about the future only a few days ahead (when it is a few weeks).
- Belief that the future will be as bad or worse than the recent past.

To restore a positive outlook on life, traumatic thoughts about the future need to be replaced with positive ones. However, positive visions of the future cannot be formed without removing the traumatic experience from the past. During psychotherapy, we encouraged children to change their state by influencing their imagination.

Our experience led us to the conclusion that three psychological conditions should be followed in this work:

1. Too rapid changes or dynamics in forming images can only bring temporary relief. The experienced reality must become an integral part of the new invention and action so that the child or adolescent can begin to create and act, transforming the initial traumatic content.

2. Do not replace a child's creative activity with your own work but create your own images instead of those produced by the child.

3. Do not fear "scary" images; that is, do not confuse the content of trauma with expressive forms of images.

The effectiveness of psychotherapy was evaluated based on data recorded during observations reflecting the dynamics of the child's state. If significant improvement was not observed, psychotherapeutic work continued for an additional two months. As a result, after two months of psychotherapy, significant improvement was observed in 7 out of 15 children, and the treatment was considered complete in these cases. In four children and adolescents, slight improvement was observed, and the treatment was extended. In two children and adolescents, significant improvement was observed, and the treatment was extended. In four clients whose sessions were interrupted for any reason, there were no changes in their condition.

From this data, it can be concluded that more than half of the children and adolescents required additional psychotherapy sessions and more intensive individual work. Their condition changed slightly or did not change, influenced by several factors. First and foremost, it is necessary to note the difficult living conditions of internally displaced persons' families, mutual influence in families where not only children but also their parents and other relatives are traumatized, as well as an unfavorable family environment (alcoholism or drug addiction of the father). This context entails repeated exposure to psychologically traumatic situations associated with shelling in unoccupied territories, as well as the "waiting syndrome" and anxiety about the future.

Our observations show that children whose clinical profile was dominated by symptoms of re-experiencing recovered faster than children with avoidance syndrome. Additionally, children with high emotional sensitivity achieved stable positive changes much faster than children with emotional blunting and callousness. Hyperactive and aggressive children mostly require a longer treatment process.

Considering that the condition of many children under the influence of traumatic circumstances and many other factors did not reach the necessary level of change, comprehensive psychological assistance should be continued to prevent the transition of PTSD into other mental disorders and deeper personality changes.

In the study of psychosomatic correctional assistance to victims of mass catastrophes, natural disasters, and local conflicts, interviews play an important role as the most common method of psychological support.

Interviews are a method of psychological support aimed at alleviating psychological discomfort. People who have experienced post-traumatic stress disorder still vividly remember their experiences, even after a significant number of years. Interviews conducted later may be more effective than immediate interventions and can also help identify individuals who have experienced psychological discomfort over a prolonged period of time.

It is also known that brief cognitive-behavioral therapy immediately after a traumatic event can improve the mental state of the victim. Symptoms of post-traumatic stress disorder are less pronounced in those who receive timely psychotherapeutic or psych corrective assistance.

In our considered estimation, personality-oriented (reconstructive) psychotherapy emerges as the modality of heightened efficacy under the following conditions:

1. Deep and comprehensive study of the child's personality, emotional reactions, motivation, and formation, structure, and functioning of the relationship system.

2. Identification and study of etiopathogenetic mechanisms that contribute to the development and maintenance of neurotic states and symptoms.

3. Correction of inadequate reactions and behavior. This is the main task of psychological assistance, which, in turn, leads to the improvement of the child's subjective well-being and the full restoration of their social functioning.



The psychotherapeutic landscape for post-traumatic stress disorders embraces a spectrum of psych corrective modalities, including psychodynamic psych correction, cognitive-behavioral psych correction, and group psych correction.

Cognitive-behavioral psych correction, characterized as a technique of "revealing intervention," orchestrates encounters, whether direct or indirect, between the child and traumatic stimuli. The rationale underpinning this approach posits that post-traumatic stress disorders are not merely instigated by the fear of stimuli concomitant with trauma but are equally predicated upon the trepidation of reminiscences pertaining to the traumatic event. Consequently, the iterative re-experiencing of emotions tethered to trauma assumes therapeutic significance, fostering the integration of negative experiences and concomitantly attenuating distress, intrusive memories, and physiological reactivity.

In numerous instances, children who have undergone traumatic experiences participate in group psychosocial interventions in conjunction with various forms of individualized therapeutic approaches. Notably, there exists a dearth of specific directives regarding the precise typology of group psych correction to be applied. Open-type groups, oriented towards pedagogical objectives and the structured exploration of traumatic memories (engagement with the "then and now"), task-oriented activities, the cultivation of trauma coping skills, enhancement of interpersonal relationships, and the establishment of cognitive-behavioral strategies, are commonly employed. Additionally, groups with a specific structure, oriented towards dynamic processes ("here and now"), are also implemented.

Psychological correction for internally displaced children ought to be conceived as a multifaceted system of interventions. This system aims to thwart the chloritization of mental disorders, protracted pathological processes, and expedite the return to social normalcy. Etiological factors contributing to psychological maladaptation in refugee children include emotional and behavioral stereotyping, manifested as personality changes acquired under extreme conditions, new reactive capabilities, and combinations of chronic anxiety, aggression, and impulsivity. Psychological interventions must incorporate the foundational tenets of contemporary integrative coping concepts, wherein children are encouraged to engage in problem resolution, modify their perception of the problem, or alleviate its consequences through distraction or other stress coping mechanisms.

The psychological modification of stress states in displaced children transpires through organized interpersonal communication, guided by principles that are open, reasoned, and principled. These general methodological principles serve as heuristics for the systematic analysis of specific problems associated with the correction of mental disorders in internally displaced persons.

Etiological psychiatric correction primarily focuses on reshaping disrupted systems of relationships and correcting inadequate emotional reactions. An alternative approach involves rational psych correction, characterized by its emphasis on mitigating the intensity of stress-related experiences. One facet of rational psych correction involves explicating the nature of neurotic disorders.

For internally displaced children who have endured psychological trauma due to forced migration, we posit that short-term psychological correction, typically grounded in a cognitive approach, proves more efficacious. The abbreviated duration of this therapeutic intervention serves to mitigate the risk of dependency and chloritization. Group or family-based psychological correction has demonstrated efficacy in individuals grappling with psychological trauma.

Illustrative initiatives include the "White Sheet of Dreams," an open forum for parents to articulate proposals for tailoring the therapeutic environment to a child's individuality; the "Mother's Living Diary," a repository for parental inquiries housed in a metaphorical "wishing well"; "Step by Step," a collaborative endeavor involving the creation of group achievement boards; and "By the Fireplace," which encompasses the curation of relaxing music, the compilation of a library of Ukrainian songs and proverbs, and the establishment of a play area.

Psychologists are implored to orchestrate support groups, extend unwavering hospitality to children, and counsel parents on effective communication methodologies. This entails embracing alter-

native communication modalities, practicing active listening, and endorsing constructive models of communicative intentions within "mother-child" and "father-child" dyads. Adaptive coping strategies should be instituted in accordance with a systemic paradigm, necessitating alterations in the distribution of responsibilities and household management rules, as well as shifts in fundamental values and beliefs. This approach aligns with a socio-ecological paradigm, whereby the family unit is incorporated into a broader framework of rehabilitative environments, inclusive of life resources and social support.

Validation and implementation of innovative forms of interaction among social partners for the development of personal qualities and life skills in internally displaced children with varying levels of physical, intellectual, and sensorimotor development occur within a multifunctional interactive environment and during shared leisure activities utilizing information-health technologies:

- Organization of joint theatrical events, wherein parents actively participate, including role distribution.

- Participation in joint exhibitions and competitions.

- Organization of collaborative games/quests.

- Implementation of eco-projects, encompassing the communal arrangement of recreational spaces.

- Artistic publications fostering self-identity and family cohesion, such as the creation of family emblems, newspapers with family sections, and panels resembling "trees" or "houses" in hallways, serving as "creative" reports on group projects.

The aforementioned forms of group work with families of displaced children alleviate the sense of isolation amid challenges, afford parents feedback opportunities, enable them to view themselves and their children from different perspectives, and provide a supportive network.

Following corrective-developmental sessions, positive shifts in anxiety levels among children were observed, with a 25% reduction in anxiety levels. A comparative analysis of anxiety indicators before and after sessions, employing the pupils t-test, revealed a statistically significant decrease in children's anxiety during the interventions ( $p < 0.01$ ). Psychotherapeutic efforts proved more effective for 6-year-old children with a history of forced migration compared to their 7-year-old counterparts, although the impact on the latter group was substantial ( $p < 0.05$ ). The significance of the difference in anxiety reduction dynamics between girls and boys was also assessed, confirming that anxiety reduction varied depending on the child's gender.

An examination of the play structure before corrective sessions through comparative analysis of the experimental and control groups demonstrated that only 16% of displaced children exhibited a level of play skill development comparable to that of children residing in a conventional environment. The level of formation of early play skills in the experimental group was significantly lower than in the control group of non-displaced children ( $p < 0.01$ ). Post-intervention, the study of changes in the structure of children's play revealed a statistically significant increase in the average level of the integral indicator of play skill formation from 1.86% to 3.54%. As a result of psycho-pedagogical rehabilitation, children displaced from conflict zones substantially reached the level of play skill development seen in their non-displaced counterparts.

The research results on the impact of developmental play sessions on subsequent growth, development, and the learning process convincingly indicate that children's attendance of playrooms positively influences the learning process in schools ( $p < 0.01$ ).

Effective psychological rehabilitation in a children's playroom diminishes the delayed impact of extreme life events on mental health and enhances the psychological safety of internally displaced children. The study's findings underscore the pivotal role of children's playrooms in addressing the challenges faced by children in extreme situations. In playrooms, children recover more rapidly from serious traumatic events.

**Conclusion.** The social implications of psycho-pedagogical rehabilitation lie in creating conditions to ensure the right to rehabilitation for participants in the educational process, specifically for IDP (Internally Displaced Persons) children and their parents. The contribution of parental involvement to the quality of education and the effectiveness of a child's social adaptation is particularly significant.

Thus, the situation of forced internal migration is recognized as a social trauma, manifested by symptoms of post-traumatic stress. Anxiety and depression are "secondary symptoms" of stress, and the traumatic experience can have long-term consequences. Children represent the most vulnerable category displaying signs of anxiety and mood disorders, especially immediately after trauma. The consequences of post-traumatic stress largely depend on an individual's adaptability.

Psychologists should organize support groups, unequivocally welcome children, and counsel parents on effective communication methods, including the use of alternative (additional) communication methods, active listening, and supporting constructive models of communicative intentions in mother-child and parent-child dyads. It is recommended to advise them to change coping strategies according to a systemic approach (alteration of duty distribution rules, modification of household duties, changes in basic values and beliefs) and a socio-ecological paradigm (inclusion of the family concept in a broader therapeutic environment with life resources and social support).

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## THEORY AND PERSPECTIVES OF PHILOLOGY

DOI <https://doi.org/10.30525/2592-8813-2024-1-28>

### PERSPECTIVES ON GENDER INDENTITY IN MODERN BRITISH AND AZERBAIJANI LITERATURE

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**Abstract.** This research article explores the evolving portrayals of gender identity in 21st-century British and Azerbaijani literature, shedding light on the diverse perspectives and narratives that reflect the changing socio-cultural landscapes of these two distinct regions. Through an analysis of selected literary works, the study aims to examine how authors like Ali Smith's, Jeanette Winterson's, Zadie Smith, Alan Hollinghurst, etc. from UK and Jafar Jabbarli, Yusif Vazir Chamanzaminli, Afag Masud, etc. from Azerbaijan engage with and represent gender identity, challenging traditional norms and contributing to the ongoing discourse on gender equality and diversity. British literature explores diverse gender expressions, delving into fluid identities and the intersectionality of gender with other facets of diversity. Simultaneously, Azerbaijani literature grapples with the complexities of modernity, offering insights into how societal shifts impact perceptions of gender roles and individual identity.

**Key words:** gender identity, British writers, Azerbaijani writers, social norms, woman, literary context.

**Introduction.** The 21st century has witnessed a significant transformation in societal attitudes towards gender identity, prompting authors worldwide to incorporate diverse and nuanced representations of gender in their literary works. This research focuses on the literary landscapes of both Britain and Azerbaijan, two countries with distinct cultural histories, to provide a comparative analysis of the ways in which gender identity is explored in their respective literatures. By comparing these perspectives, the article aims to uncover commonalities and distinctions, providing a comprehensive exploration of the evolving discourse on gender identity within the literary contexts of two distinct cultures. This analysis contributes to a broader understanding of contemporary societal attitudes towards gender, reflecting the ongoing dialogue surrounding identity in the literary realm.

**Literature Review.** Scholars have extensively explored gender identity in literature, emphasizing the importance of diverse narratives that challenge binary constructions. While British literature has a rich tradition of addressing gender issues, Azerbaijani literature, influenced by its cultural and historical context, has recently seen an emergence of voices addressing gender-related themes. The literature review contextualizes the current study within the broader scholarly conversation on gender identity in literature.

**Methodology.** This research employs a qualitative approach, analyzing a selection of contemporary literary works from both British and Azerbaijani authors. The chosen texts span various genres, including novels, short stories, and poetry, to capture the diverse ways in which gender identity is explored. The analysis will consider narrative techniques, character development, and thematic elements to uncover the underlying perspectives on gender identity in each literature.

**Objective.** The main objective of this research is to analyze and compare the representations of gender identity in 21st-century British and Azerbaijani literature. By examining selected literary works from both regions, the research aims to uncover the diverse perspectives and narrative strategies employed by authors to address and challenge traditional gender norms.



## Discussion

**The exploration of gender identity in 21st-century British literature.** Modern British literature has been marked by a significant shift towards diverse and nuanced representations. Authors have increasingly challenged traditional gender norms, contributing to a rich tapestry of narratives that reflect the evolving socio-cultural landscape. A notable trend in contemporary British literature is the exploration of gender fluidity and non-binary identities. Works such as Ali Smith's "How to Be Both" and Jeanette Winterson's "Frankissstein" have introduced characters who defy conventional gender categories, prompting readers to reconsider established norms. Both Ali Smith's "How to Be Both" and Jeanette Winterson's "Frankissstein" engage with the themes of gender fluidity and non-binary identities, exploring these concepts through innovative storytelling and complex characters. While each novel has its unique approach, both contribute to the broader literary discourse on the evolving nature of gender identities in the 21st century. In "How to Be Both" Ali Smith introduces the character of George, a 16th-century Italian artist who challenges traditional gender norms. George is revealed to be a woman living as a man, disrupting conventional expectations and prompting readers to reconsider preconceived notions about gender identity. The novel's distinctive structure, with two interconnected parts that can be read in different orders, mirrors the fluidity of gender and time. The intertwining of past and present in the narrative reinforces the idea that gender identity, like time, is not fixed. The novel suggests that historical and contemporary notions of gender are interconnected and subject to reinterpretation. In Ali Smith's novel "How to Be Both," the character of George stands as a central figure representing gender fluidity and challenging conventional notions of identity.

George is introduced as a 16th-century Italian artist, initially perceived as a male figure by the characters and the reader. However, as the narrative unfolds, it is revealed that George is a woman living as a man (Smith, 2014, p. 37). This historical ambiguity surrounding George's gender identity serves as a central theme, prompting readers to question assumptions based on appearances and historical expectations. George's character embodies the fluidity of both gender identity and artistic expression. As a woman posing as a man, George challenges the societal expectations of the time, highlighting the flexibility and malleability of identity. The fluidity extends beyond gender to encompass the broader concept of how individuals express themselves, particularly through creative pursuits. George's character intersects with multiple aspects of identity, including gender, class, and artistic identity. By living as a man and pursuing a career in the arts during a period when women faced significant limitations, George challenges societal norms and expectations (Smith, 2014, p. 93). The character's resilience and determination highlight the transformative power of individual agency in navigating and subverting gender norms.

In "How to Be Both," Ali Smith's portrayal of George contributes to a broader conversation about the fluidity of gender and the significance of individual agency in shaping identity. George's character challenges readers to reevaluate assumptions, fostering a greater understanding of the complexities inherent in the experiences of those who exist beyond traditional gender categories.

"Frankissstein" by Jeanette Winterson introduces a character named Ry Shelley, a non-binary transgender doctor. Ry's character challenges traditional gender categories and contributes to the novel's exploration of contemporary issues related to identity and embodiment. Winterson's novel delves into the concept of transhumanism, exploring the intersection of technology and identity. The narrative contemplates the possibilities of transcending traditional notions of gender through technological advancements, raising questions about the malleability of identity in the face of scientific progress (Winterson, 2019). "Frankissstein" weaves together multiple narratives, including the story of Mary Shelley writing "Frankenstein" and the contemporary storyline featuring Ry Shelley. This intersection of narratives allows the novel to examine the historical roots of discussions about identity and gender, drawing parallels between the past and present.

“How to Be Both” and “Frankissstein” contribute to the contemporary literary landscape by offering nuanced explorations of gender fluidity and non-binary identities. Through their innovative narratives and complex characters, both novels encourage readers to reconsider societal norms surrounding gender while fostering empathy and understanding for diverse experiences of identity.

“Swing Time” by Zadie Smith (2016) delves into the complexities of female friendship, race, and identity. While primarily exploring themes of race and class, the narrative also touches upon the expectations placed on women, contributing to a broader discussion on gender roles and identity in contemporary society. In Zadie Smith's novel “Swing Time” feminist perspectives are woven into the narrative, exploring the complexities of female identity, friendship, and societal expectations. The novel delves into the experiences of its female protagonists, providing a nuanced exploration of feminist themes. The central relationship between the unnamed narrator and her childhood friend Tracy spans from their early years in a dance class to their divergent paths in adulthood (Smith, 2016, p. 53). The exploration of this friendship allows Smith to delve into the complexities, support systems, and challenges that women face in their relationships with each other. The protagonists navigate their identities as women of color, highlighting the unique challenges they face within the broader feminist discourse. The novel underscores the importance of recognizing the diverse experiences of women and the intersections of multiple identity markers. The novel explores the aspirations and challenges of the female protagonists in their careers. The unnamed narrator, who works as a personal assistant to a pop star, and Tracy, who pursues a career in dance, grapple with societal expectations, gendered dynamics in the workplace, and the sacrifices women often make to pursue their ambitions (Smith, 2016, p. 79). The exploration of their professional lives reflects broader feminist discussions about work, ambition, and gender equality. “Swing Time” delves into the complex relationships between mothers and daughters. The characters navigate the expectations and pressures placed on them by their mothers, highlighting generational differences in feminist perspectives. The exploration of motherhood adds depth to the novel's feminist themes, examining how women's roles and expectations change across different eras. The novel addresses the importance of representation and visibility for women of color. “Swing Time” critiques patriarchal structures and societal expectations that limit women's agency and perpetuate inequality (Smith, 2016, p. 239). The novel prompts readers to reflect on the ways in which traditional gender roles, expectations, and power dynamics impact women's lives, choices, and opportunities. The novel explores the protagonists' journeys of self-discovery and identity formation. The female characters grapple with defining themselves outside of societal expectations and cultural norms. This theme aligns with feminist perspectives that emphasize the importance of women defining their identities on their own terms.

In “Swing Time” Zadie Smith weaves together these feminist perspectives to create a narrative that not only explores the individual lives of its female characters but also contributes to broader discussions about gender, race, and identity within the feminist framework. The novel challenges readers to critically engage with the complexities of women's experiences in a world shaped by intersecting social forces.

**Diverse Spectrum of Gender and Sexual Orientations: Queer Narratives.** In 21st-century British literature, there has been a notable increase in the representation of queer narratives, contributing to a more diverse and inclusive portrayal of gender and sexual orientations. Authors have explored a wide spectrum of experiences, identities, and relationships, challenging traditional norms and fostering a greater understanding of the LGBTQ+ community. “The Line of Beauty” by Alan Hollinghurst (2004) explores the life of Nick Guest, a young gay man, against the backdrop of 1980s Britain. The narrative delves into issues of identity, desire, and societal expectations, providing a nuanced portrayal of the complexities of queer life. Alan Hollinghurst's novel "The Line of Beauty" explores various gender perspectives against the backdrop of 1980s Britain, particularly within the context of the LGBTQ+ community.

The novel primarily revolves around the protagonist, Nick Guest, a young gay man. Hollinghurst delves into Nick's experiences as he navigates his sexuality in a society where being gay was still stigmatized. The narrative explores Nick's relationships, desires, and the complexities of being a gay man during a period marked by the HIV/AIDS crisis (Hollinghurst, 2004, p. 163). "The Line of Beauty" critically examines traditional notions of masculinity, particularly through the character of Nick and other male figures. The novel challenges stereotypes associated with masculinity and presents a diverse range of male identities within the LGBTQ+ community, contributing to a broader conversation about the fluidity of gender roles. The novel delves into sexual politics and power dynamics within relationships, exploring how societal expectations and power imbalances impact intimate connections. The characters' interactions reflect broader discussions about consent, agency, and the negotiation of power within sexual relationships. Set against the backdrop of the HIV/AIDS crisis in the 1980s, the novel portrays the impact of the epidemic on the gay community. The narrative sheds light on the challenges faced by gay men during this tumultuous period, emphasizing the vulnerability and resilience of individuals within the LGBTQ+ spectrum. While the novel primarily focuses on the experiences of gay men, it also touches on intersectionality by addressing the overlapping identities of characters. The intersections of gender, sexuality, and social class contribute to a more comprehensive understanding of the characters' lives and challenges.

Hollinghurst explores how social expectations and stigma surrounding homosexuality affect the characters' self-perception and interactions. The novel provides insights into the societal attitudes of the time and how these attitudes shape the characters' experiences of gender and sexuality. The title, "The Line of Beauty" suggests a theme of aesthetic beauty, and the novel reflects on how beauty intersects with identity (Hollinghurst, 2004, p. 375). The characters grapple with societal standards of beauty, which are often tied to gender norms, and how these standards impact their self-worth and relationships. The novel portrays characters asserting their agency and autonomy in defining their gender identities and sexual orientations.

"Oranges Are Not the Only Fruit" by Jeanette Winterson (1985): While published in the late 20th century, Jeanette Winterson's novel continues to have a significant impact on contemporary discussions of queer identity. The semi-autobiographical work narrates the coming-of-age story of a lesbian protagonist, challenging societal norms and exploring the intersections of sexuality and religion. "Oranges Are Not the Only Fruit" by Jeanette Winterson is a semi-autobiographical novel that intricately explores gender perspectives, sexuality, and the impact of religious and societal expectations on individual identity. The novel is a coming-of-age story that follows the protagonist, Jeanette, as she navigates her identity as a young woman (Winterson, 1985, p. 57). Jeanette grapples with societal expectations, particularly those imposed by her religious community, as she becomes aware of her non-heteronormative desires. The narrative delves into the strict gender roles and expectations within the Pentecostal community in which Jeanette is raised. The novel explores how religious beliefs shape and limit the roles available to women, reinforcing traditional gender norms and restricting expressions of individuality. The novel portrays Jeanette's realization of her lesbian identity and her attraction to women. Winterson addresses the challenges and conflicts that arise when one's sexual orientation deviates from societal norms, especially within the context of a religious and conservative community. The relationship between Jeanette and her adoptive mother is a central theme. The mother's attempts to mold Jeanette into a conforming member of the church reflect the tension between individual identity and societal expectations, particularly in terms of gender roles (Winterson, 1985, p. 73). Jeanette's journey can be seen as an act of resistance against prescribed gender roles and expectations. Her refusal to conform to societal norms and her determination to live authentically challenge the traditional roles assigned to women in her community. The novel uses oranges as a recurring symbol, representing not only forbidden desires but also a form of rebellion against societal norms. The oranges serve as a metaphor for Jeanette's non-conforming identity and her quest for per-

sonal freedom outside the constraints of traditional gender roles. While the primary focus is on gender and sexuality, the novel touches on the intersectionality of identity by examining how Jeanette's experiences are shaped by factors such as religion, class, and the rural setting. These elements contribute to a nuanced understanding of the challenges individuals face when navigating multiple aspects of their identity.

### **Emerging Perspectives on Gender Identity within Contemporary Azerbaijani Literature.**

While Azerbaijani literature has traditionally been characterized by a more conservative approach to gender roles, the 21st century has witnessed a gradual opening up to discussions on gender identity, albeit within a unique cultural context. Many Azerbaijani authors like Mirza Fatali Ahunzadeh, Jalil Mammadguluzadeh, Jafar Jabbarli, Yusif Vazir Chamanzaminli and others navigated the tension between traditional values and the impact of modernity on gender roles.

According to Chamanzaminli, just as the sun gives light and warmth and gives life, so does woman serves humanity. It means that the Azerbaijani people respect women, and that the Azerbaijanis raise their women to the level of gods. However, he writes that there are Azerbaijani men who want to hide this divinity and light of a woman like a black cloud, and explains their purpose as follows: *“Arvadlar üçün çarşablar, qifillar, uca divarlar icad edirlər. Elmdən uzaqlaşdırıb fikirlərini, zehinlərini qaranlıqlar ilə əhatə edirlər”*. – *“They invent sheets, locks, high walls for wives. They distance themselves from science and surround their thoughts and minds with darkness.”* (Chamanzaminli, 2005, p. 157).

Yusuf Vazir's articles about women have a common spirit: woman is holy, she has the character of divinity, it is a sin to hurt her. Beating a woman is unfair, beating a woman is unacceptable in the age of progress, beating a woman is against the civilized human condition. If women are standing on a tram or train, men should give them space, if they meet on the street, men should step aside respectfully. In his article “A wife is a dear creature”, he lists the sufferings of a woman during pregnancy, childbirth, and the postpartum period, and as a result, he writes that motherhood is so high that we men are not worthy to achieve it. He says that the role of his mother in the upbringing of many great personalities of Europe is great, and he shows Schiller, Chény, and Lamarty as examples. He writes that his mother Elizabeth played a role in Schiller's rise to fame in literature, and says that the fact that Schiller and Goethe's mothers read stories to them and memorized poems will ultimately lead to the development of the future personality. According to Chemanzeminli, the polemic of men being considered superior to women in Europe ended when talented writers, artists, sculptors, professors, and doctors grew up among women. Yusif Vazir, who wrote that it is unnecessary to open a debate about the superiority of men over women, says that if there are schools for women, the power of women will be seen. As an example of a woman, Yusif Vazir points to Hamida Javanshir, the wife of Mirza Jalil, a descendant of the Karabakh khans: “Nowadays, we have several ladies in the Caucasus who, thanks to their talent and knowledge, are erasing the stain of “imperfection” from the name of wives. Honorable Mrs. Hamida Javanshir does not lag behind our non-zamindar gentlemen in maintaining and improving her property.” (Chamanzaminli, 2017, p. 5).

Another lady whom Chamanzaminli shows as an example is Hanifa Malikova. He mentions that Hanifa educates girls, she is a hope for uneducated women, is a person who will give them advice, and supports women with their problems: *“If women are ignorant and how did women like Hanifa khanim come about? They can teach wisdom to a thousand men”* (Chamanzaminli, 2017, p. 7). Chamanzaminli also points to the example of doctor Amina Baradarshah, who studied in Petersburg and treated thousands of men and women in Baku, and says that women are equally talented as men.

True mother according to Yusuf Vazir who is – Aware of the press; Reading newspapers and magazines; buys and reads published books; Informing their children about age-appropriate news; The one who teaches his children the names of writers who work in the way of the people, introduces them to their works (Chamanzaminli, 2005, p. 417).



In the first decades of the 20th century, one of the Azerbaijani writers who raised the issue of women's freedom most seriously was Jafar Jabbarli, a great writer – playwright, poet, prose writer, theater critic, film critic (his titles are as numerous as his services). J. Jabbarli, in the play “Ogtay Eloğlu”, reflected the tragedy of the Firengiz, who trampled on his rights, who was full of passion to live and create. J. Jabbarli, who worked for the progress of Azerbaijani culture and theater and wished for the active participation of Azerbaijani women in the theater scene, highly appreciated the role played by women in the history of art during 1918-1920. Before the Republic – during the years of Soviet rule, old-fashioned people did not allow women on the stage of the theater and did not look well at women who went to the theater (this trend existed during the Republic and after – in the early days of the Soviet era, but the mentioned trend was stronger during the years when Azerbaijan was under the rule of Tsarist Russia). In such an environment, only the educated members of the highest, wives and sisters of officials would go to the theater. Firengiz, who is a typical representative of these ladies, gets acquainted with the Russian culture by studying at the suggestion and insistence of her brother Aslan, and later learns the rules of noble and aristocratic behavior characteristic from her tutor Nadia.

Innocent and shy, Firengiz has a romantic, slightly incomprehensible, sentimental attitude to life and people. Firengiz, who fell in love with Ogtay, is within the framework of dry and strict moral rules. It was her father and brother who determined the path of destiny, not herself, and deprived of the rights of humanity and femininity, Firengiz in real life she could not make it happen. Firengiz actually confirms that she loves not only Ogtay, but in his face she loves her ideals. If it were not so, an open-minded and well-educated girl would not have consciously refused the love letters she wrote to Ogtay at the insistence of her brother. Firengiz, the first swallow, gets the happiness she wished for: “Oh, Ogtay, how I wish I could be your favorite and play the role of Amalia! They also applauded me. But my father! Not even my brother would agree. I love Amalia's death. A person is innocently killed by her lover” (Jabbarli, 2005, p. 278).

In the play “Ogtay Eloğlu”, J. Jabbarli reflected the role played not only by men but also by women in the development of Azerbaijani theater art. In those days, there were many actors who were constantly ridiculed, persecuted, and even killed by ignorant people. In such circumstances, the arrival of a woman on the stage was a great revolution. This revolution took place thanks to the courage and bravery of Azerbaijani women who were threatened with being killed in the family.

It can be seen not only from his plays, but also from the stories he wrote in the 1920s and 30s that the struggle against those who enslave women and tramples on women's rights occupies one of the central places in J. Jabbarli's work. In the stories “Gulzar”, “Dilbar”, “Dilara” women's problems and women's motive are in the foreground.

In the story “Gulzar”, which he wrote in 1924, J. Jabbarli created a typical image of girls made miserable by superstition. The writer, who named his stories after his heroes, attributed the disaster that befell Gulzar to her innocence and the brutality and depravity of the people of that time. Gulzar, who is the epitome of high honor in the village, has to live through a terribly disastrous night – the night when her honor was violated, she was raped. All of Gulzar's hopes and shelter are in vain, Mansur was afraid of to accept her as a wife. She had to be a virgin, according to the social norms and man's honor he couldn't take her as a wife. In “Gulzar”, the deception caused by trust, the miseries caused by orphanhood and deprivation for women are brought to the fore (Jabbarli, 2005, p. 258).

The story “Dilbar” tells about the tragedy of the father (Hasan) who gave his educated daughter to the creditor because he could not repay the debt. It is also the tragedy of the girl herself (Dilbar) and, of course, the tragedy of society as a whole, of the time. Although he made it a condition for her to get an education while giving Dilbar, poverty does not allow Hasan to defend his daughter's right. Dilbar's lifestyle is the clearest example of the hardships of Azerbaijani women: “Dilbar's day was spent studying religious verses on Thursday evenings, and reading the Koran. Washing clothes, preparing food, and similar tasks fell on Dilbar like a heavy burden, not allowing her to live properly.



She had to come meet and welcome him with courtesy and formality, smile and laugh. Otherwise punches and kicks were inevitable and merciless. Dilbar was buried in a black grave while she was alive” (Jabbarli, 2005, p. 275).

The abyss into which Azerbaijani women fell, the swamp in which they were surrounded, was so deep and dark. J. Jabbarli's female heroes – Gultekin, Firangiz, Gulzar, Dilbar were passengers of this miserable life. The dream of women's emancipation, which constantly worries J. Jabbarli and runs through his creativity, found its artistic expression in his work “Seville”. This work, written in 1928 and staged in the same year, caused great resonance. Critics called this work a “symbol of freedom” of an Azerbaijani woman. Indeed, J. Jabbarli is a great man of words and ideas who created this symbol in Azerbaijani literature and culture.

In Sena Dohan's study, Afag Masud evaluated the sorrows of female protagonists as the sorrows of a woman whose rights have been trampled on – an Eastern woman (12). She thinks that in the country where she was born and grew up, as well as in Europe itself, “it was extremely difficult for a woman to realize herself as a creative individual. Because a woman's life is multifaceted!.. She is both a mother, a wife, a child, and an office worker... Moreover, unlike men, a woman is selfless.” Afag Masud, who created her own prototype in “Sparrow”, “Idle”, “She” and other stories, as well as in her essays, observes people, life and society from the most hidden, inner corner of her soul, passes her accurate observations through the filter of her soul and transfers them to white sheets. In one of her interviews, the author, who brought up the situation of Azerbaijani women after our country gained independence, exhibits not a feminist position, but an objective approach: “Even though many things have changed in society in general, it can be said that very little has changed for women. This change happened mainly in the social life of women. In a big sense, nothing has changed. After independence, as I said earlier, things in the society have changed for the better, but family life and intra-family relations have, on the contrary, been spoiled. Since life has become materialized, the relations between men and women and husbands have moved to this destructive level and lost their national-aesthetic value in a certain sense. By the way, many people think (I mean mainly Europeans and I have had many arguments about this) that Azerbaijan was a backward eastern country where women were exploited. Many foreign magazines sometimes present the Azerbaijani woman in the image of a shopkeeper selling fruit in the market with a floral shawl around her waist, or in the kitchen with her head tied and wrapped in a scarf. I tried to make them understand many times that women are not exploited by anyone in our country, no woman's rights are violated. Not only now, but since the time of the Soviets, which we still do not like. This was our attitude towards women. I am constantly asked about the problems of women in Azerbaijan. Of course, it goes without saying that when we say “Azerbaijani woman”, first of all, the group to which she belongs should be taken into account. In Azerbaijan, as in the whole world, there are women who work as sellers, sweepers, laundresses, and other hard workers. However, “Azerbaijani women” are not the only poor people. We also have a separate army of poor women who represent the wealthy class and spend their lives in luxury and beauty contests, and these women are not typical Azerbaijani women either. There are other groups of women in Azerbaijan. These are sane women who have gained their individual independence, are confident in their strength and abilities. However, their life is not completely without problems, and this is natural. And so there are many women's clans in Azerbaijan. Housewives, businesswomen, creative women, businesswomen and so on and so forth. Independence has not fundamentally changed anything in the lives of these women.” (Masud, 2012, p. 151).

We can compare the works of the famous English writer Virginia Woolf and the well-known figure of Azerbaijani literature Afag Masud due to the analogical and psychological similarities. Virginia Woolf and Afag Masud are both representatives of psychological-modernist prose. In the works of both writers, human alienation, duality, existential loneliness, and the revelation of subconscious secrets are brought to the fore. In this regard, during the comparative analysis of Afag Masud's “He

Loves Me” and Virginia Woolf’s “Mrs. Dalloway”, it is noticeable that the image of a woman, a mother, is taken deeper and more alive in the works of the first author. In “He Loves Me”, the mother manages to express her love even though she is irritated by her child's attitude. Since mother-child love is treated in the divine layer in the work, the deepest nature of these relationships is revealed. In Virginia Woolf, the mother-child relationship is not revealed until the end, where the nature of the mother-child relationship remains abstract because the mother cannot devote time to her child (Woolf, 2003). The author wrote this work from her own life. In contrast to “He Loves Me”, in “Mrs. Dalloway” you can feel the child's sarcastic attitude towards the mother along with the incomplete love of the mother. Afag Masud proves that, in addition to what I have listed, Azerbaijani women are also capable of writing high-level works that will be valued worldwide. Afag Masud's work focuses on the existential loneliness of a woman, the process of spiritual evolution of a person, and the flow of consciousness.

**Approbation of research results.** The key points of the article are encapsulated in the author's presentations at scientific conferences both within Azerbaijan and internationally, as well as in scholarly articles published in diverse journals, both domestic and international. The innovative comparative approach has been commended for its contribution to the understanding of how gender is portrayed, negotiated, and culturally constructed in distinct literary traditions. The positive reception during presentations at academic conferences underscores the significance of this research in bridging cultural and literary studies. Overall, the approbation reflects the scholarly merit and relevance of the study in expanding our insights into gender dynamics in literature.

**Conclusions.** Critics have acknowledged the progressive strides made in both British and Azerbaijani literature concerning gender identity. While British literature has been lauded for its bold exploration of diverse identities, Azerbaijani literature is recognized for challenging traditional norms despite facing societal resistance. However, some critics argue that both literary traditions can benefit from further intersectional perspectives and increased representation of marginalized voices.

In conclusion, the literature review reveals a dynamic and evolving landscape of gender identity representation in both British and Azerbaijani literature. While British literature showcases a broad spectrum of identities and perspectives, Azerbaijani literature, influenced by its cultural context, is undergoing a transformation, with authors gradually pushing the boundaries to address diverse gender identities. The critical perspectives highlight the need for ongoing exploration and dialogue in both literary traditions to foster a more inclusive representation of gender identity.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-29>

## WORD FORMATION PROCESS THROUGH METAPHORIZATION IN MODERN AZERBAIJANI ARTISTIC LANGUAGE

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**Abstract.** The study of linguistic problems in Azerbaijani linguistics began in the period after the 60s of the last century. Since these years, linguistic research has progressed both quantitatively and qualitatively, and has undergone rapid development. A. Dozens of our linguists, such as M. Shiraliyev, A. Demirchizade, M. Huseynzade, A. Akhundov, T. Hajiyev, A. Gurbanov, Y. Seyidov have developed deep and comprehensive methods of analysis of the language of artistic works, and these scientists have searched for talents and used them in the language and language of our classical writers and poets. motivated to conduct effective, qualitative research on stylistic features. We are also trying to continue this mission in our globalized world – in the current era, in terms of the requirements of modern linguistic science. The language of artistic works has specific characteristics, imagery, emotionality, etc. is chosen according to its qualities. Such works are very rich and colorful in language. Depending on the stylistic goal, the author of the literary works widely uses all the means available in the language within his power. These language tools have special stylistic tasks in the language of the artistic work. One of such tools is a metaphor.

**Key words:** metaphorical units, lexical-semantic method, word formation, the stylistic significance of the metaphor, epithet, allegory.

**Introduction.** It is clear that when we start from the grammatical structure of the language, we justify that in order to express a certain idea, we need to deeply understand not only the semantics of individual words, but also how the sounds and words interact with each other in the process of expressing the idea, and the syntactic structure of the language. All these collectively cover the problems of linguistics, and when they are studied in unity with each other, the research conducted can give its fruitful result. In order to increase the quality and efficiency of philological education, linguistic issues are approached from a new angle and certain researches are devoted to its actual problems. Since linguistics covers all areas and divisions of linguistic science, dozens of important problems are interpreted such as dialectology, language history, language theory, phoneme system, lexicology issues, morphology and syntax problems, the relationship between language and speech, language style diversity, literary language, comparison of religion with related and non-related languages, etc. Solving these issues has always been an important task facing linguists.

Artistic language differs from other styles of literary language due to its aesthetic expressive features. The language of the work of art should be fluent and attractive, and have a high quality of aesthetic detail. Unlike other styles of literary language, artistic numerology involves verses, each of which has its own, individual language and style (Abdullayev, 1999: 246). Elements of colloquial language are used in artistic language. Spoken language differs from language in terms of its characteristics. Dialogues are given more space here.

In Azerbaijan, stylistics has formed the sphere of interest of a number of prominent linguists. First of all, Abdulazal Demirchizade, Agamusa Akhundov, Musa Adilov, Turkan Efendiyeva, etc. can be mentioned among them. Today, scholars such as Afag Guliyeva, Durdana Aliyeva, Shamama Agakishiyeva, etc. conduct research on very important issues of stylistics.

The nature of the word, its lexical meaning, semantic structure, functional options, possibilities of expressiveness, stylistic details, aesthetics and other features can be mentioned as the main points in the focus of philological scientists. Metaphor has a special place among these issues. Because metaphor is the most necessary factor that ensures both the richness and the power of expression of the language. Metaphor is an important linguistic phenomenon related to the semantics of a word. This event is based on the polysemy of the word (Aliyev, 1989: 172). Because the metaphor derives from and refers to the basic, primary, true meaning of the word. Thus, one of the meanings of each polysemous word is primary, primary, real, and the other is secondary and figurative. If the main, primary, true meaning of the word is clear without the text, its true nature, polysemy is revealed within the text. Because the medium in which words live and change is speech.

**Discussion.** As you can see, there are many lexical-semantic types of word formation. The main research object of the article is the creativity of words and expressions that arise due to their acquisition of new meaning. This is also called word formation through metaphorization. It should be noted that the issue of creation of words and expressions through metaphorization in the modern Azerbaijani language should be widely studied (Aliyev, 1989: 172). Azerbaijani linguists dealing with the problem of word formation have occasionally touched on this issue in their research works. Linguist-scientist S. Jafarov characterizes this process as follows: In the process of lexical creation of words in Azerbaijani language, their development from polysemanticity (polysemanticity) to homonymization plays a key role (Abdullayev, 1999: 246). This phenomenon takes place, first of all, in the inner world of the language itself, and in that process the words belonging to its basic vocabulary are involved. In Azerbaijani language, the process of separating the words into their meaning and finally having many meanings takes place in all parts of speech, but the degree of the process is not the same. In the process of such word formation, the phenomenon of conversion and homonymization occurs.

In these processes, the semantic expansion of words and terms, that is, their separation, takes place. In such an ending, new words and expressions with different meanings appear. In that process, homonymization of one or more of the meanings of a polysemantic lexical-terminological unit, moving away from its main meaning, towards the formation of new words and phrases plays a major role. In one sound complex, according to the laws of internal development of the language, two or more meanings that are not directly related to each other are acquired and stabilized (Beylarova, 2008: 214). The original word form, preserving its previous semantics and structure, forms words and expressions with new meaning in that language. Therefore, the development of the word, expression from polysemy to homonymization opens the way to motivation (metaphorization). Such development creates new words.

Another way of word creation through metaphor is the method of changing words into simple words. Most of the once fixed words have turned into simple words at a certain time, and the roots of these lexical units have not been able to maintain their stability. When you separate those forms into root and suffix morphemes, they don't make any sense. The linguist-scientist H. Hasanov writes that the loss of independence of the roots in the modified words occurs mainly in two ways: either the word roots become archaic, or the phonetic composition changes (Akhundov, 1970: 103).

Metaphor, which is evaluated as a means of artistic description in scientific literature, also belongs to living spoken language and has an emotional-expressive character. There are two types of metaphor according to its characteristics:

- 1) *general metaphor*;
- 2) *stylistic or poetic metaphor*.

Common metaphors are fixed by deriving from the figurative meaning of the word, sometimes they are used by turning into a term. For example; a branch of a river, a toe of a boot, a foot of a mountain, a jackal, a fox, a snake, etc.



Stylistic or poetic metaphor is a product of purely artistic language. It is formed in the corresponding artistic work and remains a property of the artistic style. Metaphor is widely used in the language of literary works. The writer uses metaphor when appropriate to reveal the inner world of the image, to evoke certain emotional feelings in the reader, to create a short but meaningful description, image (Abdullayev, 1999: 246). Through metaphor, the writer reflects the essence of the event, the image, the described object in a more concise and short way through analogy, and manages to create a visual and concrete image. In addition to making the language of an artistic work expressive, figurative, and meaningful, metaphor also plays an important role in defining the individual artistic style of the writer. Creating an original metaphor in a work of fiction requires great skill and innate talent from the writer. Metaphors created only by an artist with such qualities have great influence. An artist must skillfully use metaphors and create stylistically appropriate ones (Akhundov, 1970: 103).

Mir Jalal uses metaphor in various stylistic moments. For example, as in his other works, Mir Jalal skillfully used metaphor in the narrative "Manifesto of a Young Man" for stylistic purpose. Let's focus on examples: The words lion and tiger mean fearlessness, shyness, courage, etc. used in meanings. For example: *"In this old village,"* he said, *"there are so many young lions that the mountain is overflowing."* The words to scream and shout express the qualities that belong to a person. By attributing the word *"shout"* to winter, the artist has figuratively described the fact that nature is also hostile to the oppressed Spring, thus creating a powerful metaphor: *"Winter was shouting with all its might to drown out this voice that came to life in the dream of an innocent creature."* The word *"to laugh"* also refers to a person. In the work, the author gave a new meaning to this word, he was able to naturally convey the echo of the joy awakened in people by the newly established Soviet government with artistic generalization and figurative metaphor. For example: *"Life laughs, nature laughs."*

Metaphors used in all styles of Azerbaijani language are called universal metaphors. Some of them have completely lost the sign of excitement and turned into ordinary neutral words and terms. Therefore, they are no longer considered as metaphors (the foot of the mountain, the head of the tree, the tributary of the river, etc.), and another part (the lion, the fox, the partridge, the flower, etc. about people) is widely used in living colloquial language, in folk literature and acts as a means of conveying strong feelings and excitement in the artistic style. We find artistic-aesthetic metaphors only in works of art. There are two types of those tropes:

- 1) tropes typical of the artistic style, that is, they can be found in the language of every writer;
- 2) individual artistic-aesthetic tropes, i.e. tropes specific to the style or language of a certain writer or poet.

The second type of metaphors occurs according to the stylistic purpose and is considered an aesthetic element of the corresponding work. Individual artistic-aesthetic metaphors appear figuratively as a result of the unity of human emotions and logical thinking. Those objects – things and events are mainly represented by names that express abstract and concrete concepts. Most stylistic-aesthetic metaphors are individual. The artist, who tries to give a subjective assessment of his objects and events, brings out different shades of meaning hidden in the depths of the word, and thanks to this, creates metaphors with powerful expression (Babayev, 1992: 12).

According to S. Jafarov's observations, in our modern literary language, the process of formation of new words through homonymization from the polysemy of the word plays a more active role in nouns and adjectives. Such a process can remain within the framework of the same part of speech, as well as it can go beyond this framework. In other words, as a noun is formed from a noun or an adjective from an adjective in the process of homonymization from the polysemy of a word, an adjective is formed from a noun, a noun is formed from an adjective, etc. may arise. These processes, of course, differ from each other according to their characteristics (Efendiyeva, 1980: 249).

The things named by the word must have common characteristics that correspond to each other. Metaphorical meaning emerges based on similarity, relationship, proximity to each other and com-

monality of function between objects. Polysemy arises from the need to express a newly formed concept in the language. The use of the word in a metaphorical sense comes from an attempt to name any new object or event of the existence that surrounds us. In a word, language units become metaphorical when they express the concepts of real existence about objects and events in a figurative form. A linguistic unit has the power to describe objects, events and actions in a metaphorical sense (Beylarova, 2008: 214).

Metaphorizing refers to image, color, internal sign similarity, time and space, expressed function, scope, etc. mainly can be. When the name of one concept is transferred to the name of another similar concept, any relations and characteristics of the first thing are adapted to the second thing. The new meaning created in the word is based on the transfer of the name of one thing to another thing, expansion or contraction of the main meaning.

Transferring the name of one object to another occurs by summarizing the separate meanings of lexical units (the name of the first object). According to Professor T. Efendiyeva, "metaphor" is a phenomenon arising from the semantics of the word. Metaphor is a product of human thinking, which always tends to imagery, it is one of the categories of language (Efendiyeva, 1980: 249).

Motivated meaning can quickly change the semantics of a lexical unit. At this time, it is revealed what and to whom the same word refers in the text, and synonymous relationships are formed. For example, the names of animals and birds are, of course, nominative meanings in the language, when those names are given to people and express other concepts (meanings of ugliness, ugliness), a synonymous relationship appears. As a result of such a connection, a new word appears. For example, M.A. Sabir used the word "crow" as both the name of a bird and the bearer of a negative sign of a person, and meant "ugly" people when he said, "*Black crows are playing, what is our remedy now?*"

The famous linguist-scientist T. Hajiyev writes: "*The words and meanings of the classical style are different, the phonetic composition of the words remains stable, but the semantics is essentially updated*". M.A. Sabir himself announces the diversity of the functional-semantic load of these words depending on the style. In general, at the beginning of the 20th century and in the present century, the words expressing the names of animals and birds, such as wolf, jackal, bull, horse, dog, cat, and hop-hop, have a certain role in the satirical style, gain typical social content in the sense of being used, and the writer's socio-political and enters the stylistic lexicon, which greatly helps to clarify the class trend. Such words, along with other words that are the product of a true satirical style, are entitled to stylistic functional semantics. It is possible to find such expressions in the example of the poem given below:

Səyyadi – cəfahardə fəhm olmayacaqmış,  
 Ahuləri – ceyranları neylərdin, İlahi?!  
 Hər küncdə min tülkü yatıb çardağımızda,  
 Ay çalağanlar, məni qorxuzmayın.  
 (Sayyadi – there will be no understanding in Jafahar,  
 What are you doing with deer and gazelles, God?!  
 A thousand foxes sleep in every corner and in our attic,  
 Hey guys, don't scare me).

(M.A. Sabir)

In some styles, especially artistic style, journalistic style and colloquial language, language units are used that give speech an additional emotional-expressive tone. An important element that increases the expressiveness of the language is the figurative meaning of the word. The meaning expressed indirectly by the word is called metaphorical meaning. Metaphor has several forms of manifestation in language. A few of the more widespread and important ones are analyzed below:

**Metaphor** – Metaphor belongs to the lexical semantic category. Although metaphor is functionally similar to simile, it is structurally different from it. Thus, unlike simile, metaphor is only simile. This

aspect makes the metaphor more compact and figurative. The formation of a metaphor is possible in different ways. As a result, its colorful forms are created.

1. Metaphors related to external similarity. For example, the tip of a shoe, a river branch, the face of milk, etc.

2. Metaphors resulting from similarity due to their internal features. For example, fox, deer, lion, wolf, lamb, etc. when the names of animals and birds are transferred to people, these words become metaphors.

3. A metaphor arises when the actions of humans and living things in general are transferred to objects. For example, death comes, thought is born, etc.

4. All verbs combine with nouns denoting inanimate objects and animate them. For example, a person dries up, a person takes root, the heart rejoices, the face smiles – these are examples of phraseological metaphors.

As we have seen, all metaphors are formed as a result of figurative comparison. For this reason, there is an implicit comparison in every metaphor. Metaphors are more powerful than similes. Here maximum compactness appeals to the theory. Metaphors derived from the figurative meaning of the word, but already fixed and sometimes turned into terms, are considered general. Stylistic metaphor is a product of artistic language. It is formed in the artistic work according to the stylistic purpose. Such metaphors are not used in spoken language. Poetic metaphor is the fruit of figurative thinking. This kind of metaphor sense is formed by the unity of emotions and logical perception (Valiyev, 1981: 99). A writer with figurative thinking sometimes feels and understands the connections between such objects, which is unusual for thinking. Those objects are mostly names of things and events that express abstract and concrete concepts. It should be noted that the poetic metaphor has an individual character.

**Epithet** – Epithet is one of the means of figurative expression of the Azerbaijani language. Translated from Greek, the epithet means "addition". The main purpose of an epithet is to add it to words denoting an object or event. It can derive from both literal and figurative meaning of the word. Most of the epithets used in poetic speech are figurative. The epithet is the result of association. The name of a sign is used as a sign of another subject by similarity. The qualities of inanimate objects can be transferred to humans and vice versa. For example: pencil eyebrows, pistachio mouth, night with sweet eyes, flirty spring, cheerful petals, etc.

An epithet is an artistic term with high imagery. It closely combines artistry and logic. Of course, there are countless signs of a thing. Epithet means only one of them. This choice itself is subjective and individual. So the epithet is always subjective. The epithet brings new spirit, artistry and emotionality to artistic language, especially poetry. By structure, the epithet is simple and complex. That is, the epithet is expressed by one or several words. The main parts of speech are usually involved in the function of an epithet (Stylistics of Azerbaijani artistic language, 1970: 240):

1. Nouns acting in the adjective function (tulip cheek, cloud puff, golden morning, pearl tooth).
2. Adjectives: green-eyed sea, yellow eyes, white arms, etc.

An epithet is a word that emphasizes an aspect characteristic of any object or action. The stylistic function of the epithet is its artistic expressiveness. Since they have high imagery, they serve to make the image and chant more expressive and focus attention on one point. It is these features that distinguish them from grammatical definitions (Valiyev, 1981: 99).

**Allegory** – An allegory is a comparison of objects or events in order to explain one thing to another. The allegory consists of the following parts:

1. Similar.
2. Analogous.
3. Sign of simile.

Yerdən ayağını quş kimi üzüb,  
Yay kimi dartınıb ox kimi süzüb.  
(He floated off the ground like a bird,  
Stretched like a bow and shot like an arrow).

Sometimes the allegory consists of only the first two parts. The stylistic function of allusion is the artistic expressiveness it creates in the text. An allegory is not just a comparison. It serves the creation of an artistic image, the imagery of the text. Simple similes are comparisons of two events in one common aspect. Complex similes are comparisons of events in a number of general respects.

**Metonymy** – Metonymy is one of the types of metaphor. The metonymic metaphor differs from the metaphorical metaphor according to the principle of formation and the functions it carries in the language. Thus, metonymy is created not on the basis of similarity, but on the juxtaposition of objects and events that are different from each other and the internal and external relations formed as a result. For example, the expression right hand (Gurbanov, 1986: 397). At first glance, this expression does not include the concepts of back, help, support. However, physiologically, the fact that a person uses his right hand more often leads to the emergence of this metaphorical meaning. Metonymy, like metaphor, is a product of human thought. It also has a historical character like a metaphor – that is, it has changed and developed over time. Metonymy is a positive phenomenon, two types of metonymy attract attention due to the quality of expressiveness and scope of use (Stylistics of Azerbaijani artistic language, 1970: 240):

1. Fixed, general metonymy.
2. Figurative metonymy.

Fixed metonymies consist of common phrases and term-specific words. Figurative metonymies do not act as terms, but as metaphors that have not yet left their expressiveness. Individual metonymies are also found in the artistic style. Metonymy derives only from the figurative meaning of the word, it depends on the existence of connections between objects and events. Metonymy is the most important and useful speech unit used in artistic style (Demirchizade, 1962: 20). It increases the possibilities of expressiveness and imagery of artistic language. There are the following types of metonymy based on the transfer of the corresponding quality:

1. Name transfer by location. The characteristic of such metonymies is that this or that place name is used to indicate the population living temporarily or permanently in that place (the whole village stopped for the performance). Various forms of metonymy arising on the basis of spatial connection are manifested. The most widespread of these is metonymy, which is the use of the name of a certain thing instead of the subject located in it.

2. Transfer of the name according to time (*My past came alive in my eyes*).

3. Author-work transfer (*I read Nizami in full*).

4. Transfer on financial grounds (*He ate three bowls*).

5. Metonymies formed on the basis of logical causality. Among them, the most interesting in terms of expressiveness are the following:

- a) metonymies based on personal names. In some cases, the names of classical heroes act as metonymy (Leyli and Majnun, Demon, Topal Teymur, etc.);

- b) it is also common to see a person's name transferred to the items he produced (Chevrolet, Ford, Chanel).

**Synecdoche** – One of the types of metaphor is synecdoche. Synecdoche refers to the transfer of the meaning of one event to another based on a quantitative relationship. Synecdoche is very close to metonymy. If metonymy is simply formed due to the transfer of one thing to another on the basis of space, time, logic, causality, synecdoche is possible as a result of transferring one thing to another on the basis of a quantitative sign (Valiyev, 1981: 99). That is, the same word is used to mean both a whole thing and a part of it. For example,



a) the word "student" used in the sentence "the main task of the student is to read" is used in a general sense.

b) the use of many in the sense of less: nizami, fuzulis, koroglus, etc. "...the essence of synecdoche is to assume this or that concept"

That is, any lexical unit used in the singular case expresses the content of the plural. Synecdoche is a stylistic fact. They create brevity and expressiveness in the text, open wide opportunities for the confirmation of the idea, integration of the subject under one name, recognition and concretization. For example:

Aldım sorağın bu sədaqətin Vaqiflər,  
Zakirlər yadıma düşdü.  
(I received your request of this loyalty, Wagifs,  
I remembered Zakirs).

(H. Huseynzadeh)

Synecdoche is of great importance in terms of characterization and individualization of images. They are artistic creators of emotionality, expressiveness, as well as imagery. Synecdoche can be formed in the following ways (Gurbanov, 1986: 397):

1. With the plural being used in the singular or vice versa (e.g. The city is completely asleep).
2. By using the part instead of the full (for example, show me a door).

**Hyperbole and litotes** – Hyperbole is a figurative expression that reflects the extreme exaggeration of any event (eg, *Tiger people are strong*). Litotes is a figurative expression that reflects the extreme reduction of any event (eg, *His mouth is a small pistachio*). Hyperbole and litotes are widely used mainly in journalistic, artistic and domestic styles. They are used to make the image more vivid and attractive. Therefore, they are rarely used in official, business and scientific styles. There are 2 types of hyperbole and litota: *universal* and *individual style*. For example, these words, which are widely used in colloquial language, are based on litota and hyperbole (Demirchizade, 1962: 20).

**Conclusions.** The cited examples suggest that these appeals to animals are not random. Words denoting parents and relatives in the household bring to life people with a certain cultural level, consciousness, and profession. The names of animals and birds in satires characterize a certain class attitude, social position, outlook on life, and the nature of artistic images. The final result is that words in our language have multiple meanings, that is, the semantic expansion and separation of the word in itself creates the event of homonymization and conversion. New words with unrelated meanings appear in the language, and this process is mostly observed in nouns and adjectives. The rich word-making possibilities of the Azerbaijani language play an important role in the creation of a figurative lexicon in the artistic language in the process of word formation through metaphorization. The semantics of a lexical unit that has acquired several meanings is, of course, specified within the context.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-30>

## RESILIENCE AND ACTIVISM: THE IMPACT OF YOUNG ADULT DYSTOPIAN NARRATIVES ON YOUNG READERS

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**Abstract.** The research article is of significant relevance, as it explores the multifaceted influence of young adult dystopian narratives on the youth. In an era marked by intricate societal dynamics, the themes presented in these narratives, including ethical dilemmas, environmental concerns, technological influences, and social inequality, resonate with contemporary issues. The primary focus on resistance and rebellion within these narratives adds a crucial layer to understanding the struggles between the oppressed and oppressors, contributing to broader discussions on societal transformation.

This research article aims to address a noteworthy gap in the existing literature in our country by investigating the transformative impact of young adult dystopian narratives, specifically honing in on resilience and activism. The relevance of this research is underscored by its intent to identify unresolved aspects within this broader context, aspiring to contribute valuable insights into how these narratives shape the concerns and actions of young generations in today's socio-political landscape.

**Key words:** resilience, activism, social engagement, youth empowerment, literature impact.

**Introduction.** The object of the study is selected young adult dystopian novels. The study aims to dissect the narrative elements, themes, and character dynamics within these novels to understand their impact on readers. The study extends beyond individual impact to examine potential broader implications for education and society. It assesses how the observed effects on resilience and activism might influence educational practices and contribute to societal awareness and change.

The outcomes of this research aim to identify ways in which these narratives may serve as empowering tools and mechanisms to raise awareness within the country. The ultimate goal is to analyze and present methods through which young adult dystopian fiction can be harnessed as a means of empowerment and awareness-building in the society.

The research aims to pinpoint the distinctive characteristics of young adult dystopian fiction, concentrating on specific selected narratives within the genre. By drawing on insights from prior research, the study aims to underscore the primary elements that resonate with the target readership and audience. Additionally, the research seeks to explore the potential influence of young adult dystopian narratives on the youth of our country. By delving into recent research and publications, the study initiates discussions on the influential role of literature, particularly dystopian narratives, in shaping the attitudes of society. Utilizing qualitative methods, such as textual analysis, and quantitative data from surveys, the research endeavors to comprehensively understand students' perceptions and experiences regarding resilience and activism in young adult dystopian narratives.

While discussions surrounding utopian and dystopian literature have been extensive, recent attention has increasingly turned toward young adult dystopian narratives. Although this category shares common features with traditional utopian/dystopian narratives, YA dystopias distinguish themselves through their urgency, dynamism, and, most notably, their depiction of hope. Our analysis draws on comprehensive research in the field, complemented by insights derived from literary texts.

Nevertheless, our objective is to carry out a comparative analysis, incorporating findings from research conducted both internationally and within our country. Our intention is to perform a comprehensive comparative analysis, synthesizing insights from studies conducted in various countries, including our own.

Furthermore, our goal is to pinpoint how young adult dystopian narratives can be harnessed to heighten awareness among the younger generation and empower their active involvement in the surrounding processes. The discoveries from this study have the capacity to offer innovative viewpoints on the transformative influence of literature in shaping youth engagement, paving the way for additional exploration and comprehension in this pivotal direction. Young adult dystopian narratives encompass a wide array of themes, reflecting the intricate tapestry of contemporary societal dynamics. These narratives often navigate cultural and moral ambiguity, presenting characters with ethical dilemmas that defy clear distinctions between right and wrong. Environmental concerns play a pivotal role, delving into the repercussions of ecological crises and humanity's impact on its surroundings. The tension between individual autonomy and collective welfare serves as a recurring motif, depicting protagonists navigating moral complexities in their pursuit of personal freedom. Furthermore, technological influence remains a pervasive theme, exploring the implications of advanced technology, surveillance, and artificial intelligence. Social inequality is also scrutinized, unraveling the stratification and disparities that shape dystopian worlds.

In recent times, there has been a growing interest among young people in young adult dystopian narratives. This surge in interest can be attributed, in part, to the adaptation of these works into visually compelling cinematic experiences. The production of feature films not only aligns with the genre's topical relevance but also contributes significantly to its popularity. Essentially, both young adult dystopian novels and their film adaptations are born out of a common motivation and serve analogous purposes. Consequently, the examination of aspects such as the distinctive characteristics of this subgenre gains significance, particularly when considering how to cater to the interests of young readers and what qualities the works aim to impart to them.

Exploring strategies to harness the potential of young individuals, who represent the future vigor of society, is a crucial undertaking. Consequently, our attention is directed toward addressing the research gaps identified within the analyzed field. Our primary focus revolves around investigating the influence of young adult fiction in cultivating qualities like resilience and activism among the youth. To accomplish this, we have selected literary works such as "The Giver" and "Hunger Games", "The Maze Runner", "The Road", "The Uglies", "Divergent". In the subsequent sections, we present the outcomes of our survey, encompassing the prevailing attitude toward this genre in our country, along with an in-depth analysis of the chosen literary works.

Utopian and dystopian literature has been the subject of extensive research (Darko Suvin, Gregory Claeys, Tom Moylan etc.), with insights from these studies influencing subsequent scholarly endeavors. Darko Suvin, particularly focused on the intersection of these themes with science fiction, posits that these literary works serve to disrupt conventional thinking by challenging readers' perceptions of the world. Suvin coins the term "cognitive estrangement" (D. Suvin, 2010, p. 40) to describe how these works craft alternative realities that prompt readers to reassess their understanding of the world. In contrast to Suvin's focus on the intersection of utopia, dystopia, and science fiction, Gregory Claeys specifically delves into pure utopia and dystopia, categorizing the latter into three distinct types. Claeys' examination offers a crucial foundation for exploring the primary themes within dystopian literature. Defining dypes of dystopia G. Claeys identifies three major types, "...the political dystopia; the environmental dystopia; and fnally, the technological dystopia, here science and technology ultimately threaten to dominate or destroy humanity. Amongst these types, it is the totalitarian political dystopia which is chiefly associated ith the failure of utopian aspirations, and hich has received the greatest historical attention" (G. Claeys, 2017, p. 5). Tom Moylan brings intriguing perspectives to

the study of utopia and dystopia. Concentrating on the essential characteristics of dystopian literature, Moylan underscores that this genre is more than a mere warning; instead, it serves as a narrative demanding scrutiny and a reimagining of societal structures, "...they teach their readers not only about the world around them but also about the open-ended ways in which texts such as the ones in front of their eyes can both elucidate that world and help to develop the critical capacity of people to know, challenge, and change those aspects of it that deny or inhibit the further emancipation of humanity" (T. Moylan, 2000, p. 199).

As we mentioned, young adult dystopia narratives have garnered attention in recent years, becoming the focus of new research within a broad scholarly framework. While studies on utopia and dystopia narratives have been extensive, the exploration of adult dystopian fiction and feature films is a relatively nascent area of inquiry. Although there is some existing research on this subject, it remains limited compared to the extensive body of work on other genres. Research in this domain is primarily presented through research dissertations, conference dissemination and scientific articles. There is a scarcity of books that provide an accurate exploration of the subject, similar to works like Hintz, Carrie, and Elaine Ostry's edited collection, "Utopian and Dystopian Writing for Children and Young Adults". The young adult dystopian narratives under examination affirm the validity of the concepts proposed by the aforementioned researchers regarding dystopia. These narratives continue to be rich in elements of science fiction, political regimes, and environmental concerns. A predominant theme revolves around the portrayal of dystopias that initially appear utopian or conceal a dystopian reality within a society ostensibly crafted with utopian intentions. Hintz and Ostry also mention that in dystopian societies "...the ideals for improvement have gone tragically amok.." (C. Hintz, E. Ostry, 2009, p. 3). So, one of the main aspects of dystopias which continue in young adult dystopian narratives is the problems that lie hidden under the utopian surface. However, a key distinguishing feature of young adult dystopian narratives lies in their heightened dynamism and optimism, predominantly anchored in the actions, activism and resilience of the young adult generation. Hence, given that the primary objective of dystopian narration is recognized as evoking concern among readers, a key focus for researchers is the extent to which young adult dystopian narratives influence their intended audience.

In her research article titled "Engaging "Apolitical" Adolescents: Analyzing the Popularity and Educational Potential of Dystopian Literature Post-9/11", Melissa R. Ames investigates the educational possibilities presented by young adult dystopian literature, contending that delving into these texts could serve as a minor stride toward involving students in matters of social justice, potentially igniting more explicit political involvement. Comparing young readers' interest in Young Adult Dystopian literature and their direct political engagement the author comes to a conclusion that, "This literary trend indicates that while these young readers may be disheartened by contemporary politics and under-informed in current events, they are not uninterested in the social problems that underlie both. The success of these novels implies that teenagers are willing to entertain societal critiques—even ones that implicate themselves. Rather than being a problematic discrepancy, the "mismatch" between the reading interests of young adults and their direct political action suggests that young adults could easily be molded into more politically engaged citizens" (Ames, 2013, p. 18).

In March 2020, the American Journal of Undergraduate Research released an article titled "Exploring the Relationship between Dystopian Literature and the Activism of Generation Z Young Adults". The primary aim of this study was to examine potential correlations between the activism displayed by Generation Z young adults and the prevalence of dystopian themes in literature and literary media. The study indicated that the younger generation is significantly impacted by dystopian narratives featuring young adults, leading to the suggestion that such narratives have a profound influence on them, "The main conclusion to be drawn from this research is dystopian literature's potential significance in encouraging/shaping the progressive mindsets of its audience. It is certain



that Generation Z young adults and children have been surrounded by fictional dystopian storylines in literature and in the literary media for the past decade” (A. Jerald, 2020, p. 92).

Discussing the adolescent development and dystopian narratives the authors of “Understanding the Appeal of Dystopian Young Adult Fiction” mention that, “For teachers and librarians both, we feel strongly that the connections between these novels and teens’ lives and concerns argue for a need to showcase these books as we converse with teens about their reading. While the same could be said of most YA literature, dystopian literature seems to speak particularly strongly to teens at this time and to the choices and challenges they face as they move toward adulthood” (Scholes and Jon, 2013).

As members of the educational institution, we share a significant interest in the influential impact of young adult dystopian narratives and strategies for utilizing them to enhance awareness and activism among our young students.

### **Discussion**

**Shaping the Narrative of Young Adult Dystopian Narratives.** Upon scrutinizing articles addressing young adult dystopian narratives, it is evident that authors attribute the appeal of this genre to the age group’s connection with feelings of anxiety and concern stemming from the changes they undergo. The teenage years are marked by distinct features such as rebellious behavior, endeavors for self-assertion, and the excitement of shaping one’s identity. Overall, this phase is commonly acknowledged as challenging. Analogous to the protagonists in young adult narratives who envision their utopias within dystopian realms and actively rebel against prevailing conditions. An intriguing element is that conclusions of young adult dystopian narratives typically carry a sense of hope, leaving both the protagonist and the reader with optimistic expectations for the future.

In numerous young adult narratives, the catalyst for the rebellion among young protagonists stems from their identity crises. Faced with the challenge of fitting into a dystopian society which is fragmented into distinct factions, these protagonists perceive active resistance as their means of escape. The protagonists’ triumph in this struggle is contingent upon their demonstrated perseverance and tenacity.

In “The Hunger Games”, the interplay between societal fractions, identity crises, and the protagonist’s activism and resilience creates a rich narrative that explores themes of social injustice, self-discovery, and resistance against oppressive systems. Suzanne Collins masterfully intertwines resilience and activism, using Katniss Everdeen’s character to not only survive a dystopian reality but also to challenge the status quo and inspire a rebellion that reshapes the narrative of the entire series. The divisions within the society of Panem, coupled with identity crises, form a backdrop against which the protagonist, Katniss Everdeen, navigates challenges that demand resilience and activism. The distinct fractions or districts in Panem represent economic and social divides. Katniss, hailing from the impoverished District 12, grapples with her identity shaped by poverty and struggle, “Our part of District 12, nicknamed the Seam, is usually crawling with coal miners heading out to the morning shift at this hour. Men and women with hunched shoulders, swollen knuckles, many who have long since stopped trying to scrub the coal dust out of their broken nails, the lines of their sunken faces” (S. Collins, 2008, 4). The fact that the story is narrated in a simple, fluent language by the first person adds to the reader empathy. The societal fractions impose predetermined roles, contributing to Katniss’s identity crisis as she questions her place in a society marked by inequality. The Capitol’s lavish lifestyle and excesses create a stark contrast to the districts’ struggles. The opulence of the Capitol shapes an identity crisis for Katniss, who rejects the Capitol’s values. Her resistance to conform to the Capitol’s expectations becomes a form of activism as she strives to retain her sense of self. The Reaping, where tributes are selected for the Hunger Games, becomes a pivotal moment in the characters’ lives. Katniss faces the identity crisis of being chosen as a tribute, forced into a role that challenges her core beliefs. Her resilience in this moment is the initial spark of activism, as she confronts the injustice of the Games. Thus, The Hunger Games arena becomes a battleground for

identity, where tributes must grapple with moral dilemmas and ethical decisions. Katniss's resilience in the face of physical and emotional challenges transforms into activism as she defies the Capitol's rules, forming alliances, and questioning the morality of the Games.

Katniss's evolution into the Mockingjay, a symbol of rebellion, is a manifestation of her activism against the oppressive Capitol. Her identity crisis transforms into a deliberate act of resistance, inspiring others to join the fight for justice. Her resilience is evident in her ability to endure loss and trauma, from the death of her father to the challenges posed by the Hunger Games. Her capacity to withstand adversity becomes a form of silent activism, showcasing strength in the face of oppression.

In Veronica Roth's "Divergent" the intricate interplay of societal factions, identity exploration, and the protagonist's activism and resilience weaves a compelling narrative that explores themes of conformity, individuality, and the fight against oppressive systems.

The society in "Divergent" is divided into factions based on personality traits. Tris, the protagonist, faces an identity crisis as she doesn't neatly fit into a single faction. Her divergence challenges the strict categorization, leading to a profound exploration of her identity. Tris's choice to join Dauntless, a faction known for bravery, requires immense resilience. Her decision sets in motion a series of challenges that test her physical and mental strength, demonstrating resilience in adapting to the demanding environment of her chosen faction. Tris undergoes initiation challenges that demand not only physical prowess but also the courage to question the faction system. Her refusal to conform to the societal norms becomes a form of activism, challenging the established order and prompting others to reconsider their beliefs. The line quoted becomes her motto, "I believe in ordinary acts of bravery, in the courage that drives one person to stand up for another" (V. Roth, 2014, 161). Tris's divergence becomes a central aspect of her identity, leading to internal and external conflicts. The revelation of her divergence puts her at odds with the faction system's leaders, forcing her to confront her identity and resilience in the face of societal expectations. Her ability to resist simulations designed to control individuals shows her activism against the manipulative nature of the faction system. Her resilience in resisting mental manipulation becomes a catalyst for broader resistance against the system. Tris evolves into a symbol of resistance as she challenges the faction system's inherent flaws. Her activism extends beyond personal survival, inspiring others to question the system and join the fight for a more just and equitable society. She faces significant losses throughout the narrative, testing her resilience. Her ability to persevere through grief and adversity becomes an integral part of her identity and fuels her determination to bring about change. Thus, in the series, the societal divisions, exploration of identity, and the protagonist's activism and resilience contribute to the dynamic narrative.

In James Dashner's "The Maze Runner", unlike the conventional factions found in previously examined dystopian novels, the narrative features distinctive groups and explores themes surrounding society and identity crises. These elements serve as driving forces behind the protagonist's acts of activism and resilience.

In "The Maze Runner", the Glade is a unique society with distinct groups and roles. These groups, such as Runners and Builders, form a makeshift societal structure that dictates the tasks and responsibilities of each member. The protagonist, Thomas, experiences a significant identity crisis as he navigates the mysterious environment of the Glade, it is stated again and again by himself and others that, "For some reason, he was different from everyone else in the Glade." (J. Dashner, 2009, 43). His memory loss adds to the uncertainty, making him question his past, purpose, and role in the unfolding events. As Thomas becomes aware of the challenges posed by the Maze and the mysterious organization behind it, he takes an active role in seeking solutions. His determination to explore the Maze and uncover the truth demonstrates a form of activism against the constraints imposed on the Gladers. The characters, including Thomas, exhibit resilience in the face of numerous challenges. From navigating the ever-changing Maze to dealing with the dangers it presents, the characters display a remarkable ability to endure and adapt.

In “Uglies”, Westerfeld weaves a narrative that delves into the impact of physical appearance on societal divisions, the resulting identity crises, and the protagonist's journey toward activism and resilience in challenging the established order. The society in “Uglies” is also divided into distinct factions, this time based on physical appearance. Individuals undergo a transformation at the age of sixteen to become “Pretties”, further emphasizing societal divisions based on superficial criteria. Tally Youngblood, the protagonist, undergoes a profound identity crisis as she approaches the transformation to become a Pretty. The pressure to conform to societal standards challenges her sense of self, prompting her to question the cost of conformity. Tally’s journey evolves into an act of activism as she becomes involved with a group challenging the established norms. Her growing awareness of the drawbacks of conformity and her desire to resist societal manipulation align her with a rebellious movement. Tally displays resilience as she grapples with the consequences of her choices and the challenges posed by the society that seeks to control and mold its citizens. Her determination to resist the pressures and seek individuality demonstrates her resilience in the face of societal expectations.

In Lois Lowry’s “The Giver”, thematic elements contribute to the exploration of a controlled and seemingly utopian society, revealing the complexities of individual identity and the protagonist’s transformative journey toward activism and resilience. In the society depicted in “The Giver”, there is a structured system that assigns roles and functions to individuals, creating a seemingly uniform and controlled community. Different roles are designated for citizens based on their abilities and traits. Individuals are expected to adhere to established rules; otherwise, they face the possibility of being eliminated. This guideline is explicitly outlined in the regulations. Those who don't conform have the option to request their release, “It says so in the rules. If you don't fit in, you can apply for Elsewhere and be released” (L. Lowry, 1993, 48). The protagonist, Jonas, experiences a profound identity crisis as he grapples with the revelation of the true nature of his society. The awareness of the suppression of emotions and memories prompts Jonas to question his own identity within this constrained environment. Jonas’s growing realization of the limitations and flaws in his society sparks a sense of activism. His desire to challenge the status quo and bring about change becomes a driving force, particularly as he learns about the depth of control exerted by the authorities. Jonas exhibits resilience in his journey to defy the established norms and seek a different path for himself and his community. His determination to confront the harsh truths about the society he lives in showcases his resilience in the face of adversity.

In “The Road”, McCarthy paints a grim picture of a world stripped of civilization, where individuals confront profound identity crises amid the struggle for survival. The protagonist’s activism is expressed through his commitment to preserving his son’s humanity, and resilience becomes a fundamental trait in the fight against the overwhelming challenges of the post-apocalyptic environment. In the aftermath of an unspecified catastrophe, societal structures have collapsed. The remnants of humanity are reduced to struggling for survival in a desolate, lawless landscape. The unnamed father and son, the central characters, grapple with their own identities in a world that has lost its familiar structures. Their struggle to retain their humanity and morality becomes a profound exploration of identity in a bleak setting. The father’s determination to protect his son and find a semblance of goodness in the harsh reality constitutes a form of activism. His resilience is evident in the face of constant danger and scarcity, as he navigates the desolation with the hope of reaching a more hospitable place.

As observed, common attributes emerge in young adult dystopian narratives. Youthful protagonists, opting for resistance, emerge in societies that may initially appear utopian or where injustices are ignored, and individuals choose submission despite witnessing them. Their determination and activism resonate with peers, particularly those of their age, giving rise to a widespread resistance capable of instigating transformation. These young heroes often evolve into symbols of awakening and resilience within society, embodying the potential for positive change, those who maintain these qualities throughout the struggle symbolize the hopeful future of humanity. Young adult dystopias redefine the conventional notion of dystopia from merely a bleak and inhospitable place to one characterized by struggle and optimism. In these

narratives, dystopias are no longer stories of despondent and suffering individuals; instead, they depict a journey of empowerment and the awakening of resilient characters brimming with future potential. Upon examining our current reality, it becomes evident that these narratives serve as valuable resources, empowering the younger generation to face future challenges with strength and awareness.

**The Power of Stories: Examining Young Adult Dystopian Narratives and their Effect on Youth Resilience and Activism.** As we mentioned, young adult dystopian narratives in literature and film have become a prevalent cultural phenomenon, offering narratives that often explore themes of resilience and activism in the face of oppressive societies.

We carried out a brief survey to gain insights into the impact of dystopian narratives targeted at young adults on the youth in our nation. This survey aimed to investigate the influence of such narratives on the perceptions of resilience and activism among university students aged 18–20 in Azerbaijan. Understanding how these narratives shape the perspectives of young adults is crucial for comprehending their impact on societal attitudes and values. By focusing on this demographic, we aimed to gain insights into the formative years when individuals are actively shaping their worldviews.

**Methodology and Participants:** The investigation took place among students in their third year at Azerbaijan University of Languages in December of 2023. The survey was conducted among university students aged 18–20, recognizing this age group’s pivotal stage of intellectual and emotional development. A total of sixty participants were included in the study.

**Survey Design:** The survey instrument consisted of multiple-choice questions and scaled items. Questions were crafted to assess participants’ exposure to young adult dystopian narratives, their perceptions of resilience and activism, and any potential influence of these narratives on their beliefs and behaviors.

**Data Collection:** The survey was administered online to enhance accessibility and participation. Participants were assured of confidentiality, and the survey ten questions covering diverse aspects related to young adult dystopian narratives, resilience, and activism.

Chart 1

**Frequency of Involvement with Young Adult Dystopian Narratives in Literature and Film**

Occasionally:	60%
Frequently:	40%

Description: Survey Responses Indicate a Low Percentage of Students Frequently Engaging with Young Adult Dystopian Narratives

Chart 2

**Perceptions of Resilience Portrayed by Dystopian Narratives**

4	70%
5	30%

Description: Most students predominantly selected a rating of 4, indicating a high perception of effectiveness, on the scale of 1 to 5, regarding how well young adult dystopian narratives portray resilience.

Chart 3

**Perceptions of Activism Portrayed by Dystopian Narratives**

4	80%
5	20%

Description: On the 1–5 scale ranging from none to highly effective, the majority of students opted for a rating of 4, signifying that they perceive the portrayal of activism in young adult dystopian narratives as effective.



In addition to assessing the effectiveness of portraying resilience and activism, we aimed to understand the students' interpretation of the motivations driving characters' resilience and activism in young adult dystopian narratives. The responses from students revealed a prevalent association of motivations driving characters' resilience with qualities like Perseverance, Courage, and Hopefulness. Similarly, motivations behind activism were often linked to character traits such as Resistance against oppression, Protection of human rights, and a Desire for equality. Surprisingly, the students did not identify environmental concerns as motivations driving characters' resilience and activism, despite it being a prominent theme in dystopian narratives. Another unexpected finding emerged during our research. In addition to engaging with students, we also held discussions with proprietors of publishing houses and bookstores. Surprisingly, it became evident that the interest in translated versions of young adult dystopian narratives is lower than our initial expectations. Upon comparing these outcomes with the study referenced earlier, it became apparent that the impact of young adult dystopian narratives on youth engagement in our country is different.

In the final analysis, when considering which medium, literature or film, is more effective in conveying the themes of resilience and activism, the majority of students favored film. When recommending a young adult dystopian narrative (either literature or film) to a friend with an interest in themes of resilience and activism, the majority of students suggested "The Hunger Games" and "The Maze Runner". The prevalent choice of these narratives was driven by their compelling portrayals of resilience and activism, making them stand out among other options.

**Approbation of research results.** The main provisions of the article are reflected in the author's theses submitted to scientific conferences in Azerbaijan and abroad, as well as in scientific articles published in various journals in Azerbaijan and abroad.

**Conclusions.** The emergence of utopian themes in literature represented authors' endeavors to grapple with real-world political, social, and cultural challenges. The shift from utopia to dystopia marked a continuation of this thematic exploration. Dystopia evolved into a cautionary narrative, forewarning of potential dangers if prevailing issues were left unaddressed. Moreover, dystopia injected vitality into the traditionally stable and passive utopian plots by introducing elements of struggle, protest, and resilience. A notable contemporary development in dystopian literature is its concentrated focus on young people, both as the primary audience and protagonists, resulting in the emergence of the distinct subgenre known as young adult dystopia, which has gained considerable popularity in recent years.

In the exploration of young adult dystopian narratives, it is evident that this genre, evolving from the rich history of utopia and aligning with the progress of science fiction, has successfully established itself in both fiction and cinematic art. Traditionally, utopias were characterized by idealized, harmonious societies, but contemporary modifications in dystopian narratives have brought forth a shift in power dynamics, revealing oppressive regimes and the consequences of unchecked authority. The tension between personal liberties and sacrifices required for societal stability, as well as the examination of the dark side of technological advancements, further distinguishes this dynamic genre.

Young adult dystopian narratives, with their focus on issues relevant to the younger generation, have garnered significant interest. Analyzing works such as "The Hunger Games", "The Maze Runner", "The Road", "The Uglies" and "The Giver", it is apparent that these narratives, often centered around young protagonists, play a pivotal role in shaping the strength and activism of future generations. They contribute to the development of qualities essential for navigating a complex and challenging world.

In our investigation into the interest in young adult dystopian narratives in our country, we encountered a notable surprise with a lower-than-expected familiarity with the genre. However, among those who have engaged with the works, a high level of analysis was evident. This underscores the potential impact of these narratives on readers and viewers, as they delve into the motivations and characteristics of the protagonists.

Looking ahead, it is essential to consider strategies for increasing awareness and engagement with young adult dystopian narratives. Educational initiatives, book clubs, and film screenings can provide platforms for discussions and deeper exploration of the themes presented in these narratives. By fostering a greater understanding of the genre, we can empower young individuals to critically assess societal issues and cultivate the resilience and activism needed for positive social and political engagement. As dystopian narratives continue to evolve, they remain a potent medium for shaping the perspectives and actions of future generations.

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DOI <https://doi.org/10.30525/2592-8813-2024-1-31>

## DATA VISUALIZATION IN JOURNALISM: ANALYSIS OF AZERBAIJANI TRADITIONAL AND SOCIAL MEDIA OUTLETS

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**Abstract.** Data visualization allows your recipients to see the concepts you are learning in a more interesting way. Data visualizations, called infographics, allow us to see patterns and relationships in data (or numbers) that tell a story using various charts, tables, graphs, maps, or landscapes. This also corresponds to the potential of modern people to accept information more easily. Visualizations are an effective way to present complex information and allow people to understand it quickly and easily. Thus, by converting data into a visual format, data journalists can create a more accessible and attractive presentation of information and facilitate communication with a wide audience. The article talks about visualization, which is a third stage of data journalism, and its main elements, at the same time, the Azerbaijani media environment, more precisely some traditional including TV channels news programs and social media outlets are analyzed in this regard, and the problems encountered are discussed.

**Key words:** data, visualization, media, graphic design, map, diagram, social media.

**Introduction.** The rapid development of information and communication technologies has led to great changes. Data collection and storage processes have been significantly improved, digital data collection methods and cloud-based storage systems have been used instead of traditional methods. The development of the Internet has made it possible to establish connections more quickly and easily. The emergence of new media has provided the masses with more information resources and made the communication process more interactive. Data journalism also emerged as a result of such a change.

It should be emphasized that the statement made by WWW founder Tim Berners-Lee in 2010 also played an important role in the development of data journalism. His remark that the future of data journalism is based on data analysis revealed the need for states to disclose more data and developed the concepts of open state and open government (Dag Media, 2016: 29).

Data journalism is closely related to other fields, such as cybercrime reporting, infographics, data visualization, database journalism, information management systems, etc. Therefore, data journalism, which has a wide spectrum, is a field of journalism in which complex stories are created using large databases, infographics and other data visualizations. In this four-stage process to obtain a finished media product, the visualization stage, which is considered the third and attracts more attention of the audience, is very important. The information we collect is transmitted through images that are visual representations. After filtering the raw numbers, it is possible to present better visual products through charts, graphs, tables, maps, even animations. Data visualization, for example, enables more fact-based reporting. New platforms offer creative ways to connect with different demographics. But ultimately, better data journalism is about digging deeper and looking further.

**Conceptualization.** Data journalism is used to combine a number of concepts and their connections with journalism. Sometimes it is seen as different levels or stages of new technologies in the process of production, processing and dissemination of information, from simple to complex.

Visualizations are an effective way to present complex information and allow people to understand it quickly and easily. By transforming data into a visual format, data journalists can create a

more accessible and engaging presentation of information and facilitate communication with a wide audience. This is one of the many reasons data journalists can turn complex data into easy-to-understand visualizations like charts, graphs, and maps. Data journalists can use Infogram, Canvas, and other programs to create visualizations that convey complex information clearly and concisely. The interactive features of said applications allow users to explore data and gain insights in real-time. This can help readers better understand the data and the story behind it. Data visualization is divided into linear, planar, volumetric, multidimensional, hierarchical, temporal, and transmission types (V. Isgandarova, 2023: 57–58).

There are a number of types for visualizing ready-made data:

- 1) Line graph;
- 2) Column chart;
- 3) Scatter plot;
- 4) Pie chart;
- 5) Diagrams;
- 6) Maps;
- 7) Area chart.

They also have their own small species. For example, charts are divided into types such as column, bar, line, area, stacked bar, mecca, pie, balloon, waterfall, funnel.

These data visualization forms can be obtained with the help of paid or free programs. They mainly consist of:

- 1) Google Charts;
- 2) Tableau;
- 3) Grafana;
- 4) Chartist;
- 5) FusionCharts;
- 6) Datawrapper;
- 7) Infogram;
- 8) ChartBlocks;
- 9) Canva.com;
- 10) Pictochart.

Visualized information is generally more persuasive and less likely to be questioned by readers than other information. Data quality, i.e. the quality of the data used for visualization, is a top priority for good visualization. If the raw data is not good enough, visualization may not be possible. At this time, there may be serious errors in the visualized content. Generally visual presentation of data is not enough, just having technical skills. Thus, in order to present the data according to the best analysis method, it is important to clarify the comparison, contrast and differences of the data during visualization, to bring the facts together, and to pay attention to the accuracy and quality of the content.

**Literature review.** The academic works of researchers from Western countries, especially the USA, Great Britain, Germany, France, experts from neighboring Turkey, Russia should be specially emphasized. German journalist Mirko Lorenz, the innovation manager who founded Data wrapper, has research in both media and theoretical sources about the definition of data journalism as a term, its scientific and practical nature. "The Data Journalism Handbook" consisting of two books by J. Gray, L. Bounegru and L. Chambers is one of the most widely available theoretical resources for scientists (4). Professor Paul Bradshaw of the University of Birmingham's Data Journalism MA program has a number of valuable studies. Seth C. Lewis from the United States and Oscar Westland from Sweden have conducted epistemological studies on big data and journalism, while also exploring the economics and ethics of this issue. Carl W. Lewis of Mercer University explores the tools and resources of data journalism. French-speaking Belgian scholars Juliette De Maeyer, François Heinderyckx, Florence Le



Cam, Manon Libert, and David Domingo have provided a quantitative assessment of data journalism coverage in Belgium. The main trends and currents in data journalism have been scrutinized by Turo Uskali, Heikki Kuutti and Tanja Aitamurto, Esa Sirkkunen, Pauliina Lehtonen from the University of Finland. Ester Appelgren and Gunnar Nygren, who are considered to be the first to use the term data journalism, are well-known researchers in this field in Sweden. Most of the research centers and universities specialized in data journalism are in the USA and Great Britain (Missouri School of Journalism, Guardian Database, etc.). Also Lev Manovich from California University researches various spheres of media studies as well as visualization methods. In Turkey, Pınar Dag is one of the world's leading scientists in this field, and his professional activities are related to the co-founder of the Data Literacy Association (DLA) and his experience at Dag Media, a frequent data news site.

There is not any relevant scientific literature in the Azerbaijani language about the scientific and theoretical foundations of data journalism. Only "Handbook of Data Journalism" by J. Gray, L. Bounegru and L. Chambers translated into Azerbaijani by Karim Aliyev from Mingachevir State University is known. An article entitled "Data Journalism" written by Aynur Bashirli, Ms. Javadova, and Sabina Izzatli was published in the book "New Media Journalism" published by the Council of Europe within the Framework of Programmatic Cooperation for Azerbaijan, Armenia, Georgia, the Republic of Moldova, Ukraine and Belarus.

**Research methodology.** In the article, a number of scientific-theoretical works were summarized and descriptively analyzed, and at the same time, social media sites and traditional TV channels of Azerbaijan were monitored. One representative of the MEDIA agency Parvana Ibrahimova was also interviewed about the reasons for the lack of development of data journalism.

**Analysis of azerbaijan's traditional and social media environment.** In data journalism, the visualization phase begins after the collected data is analyzed. Data visualization refers to the process of preparing the data that emerges at the end of the analysis in a form that can be understood by everyone through various visualization methods such as graphics, tables and maps. In data journalism, data visualization provides easy communication and allows information to be presented in an interesting structure (Gray, J., Bounegru, L., Chambers, 2012: 166).

Media visualization can be formally defined as creating new visual representations from the visual objects in a collection (Manovich, 2011a). Graphing and visualization tools that are available in Google Docs, Excel, Tableau and other graphing, spreadsheet and statistical and software do offer a range of visualization techniques designed to reveal patterns in data. However, these tools have their own limitations. A key principle, which underlies the creation of graphs and information visualizations, is the representation of data using points, bars, lines, and similar graphical primitives. This principle has remained unchanged from the earliest statistical graphics of the early 19th century to contemporary interactive visualization software which can work with large data sets (Manovich, 2011a). Today, many transnational media organizations such as BBC, CNN, AL Jazeera, France 24, The Washington Post, The New York Times, The Guardian of the world, despite the difficulties of data visualization, widely use it in their releases, storytelling, mainly in news releases frequently. And on platforms like Linked in, X (Twitter), Threads we can find a great number of data visualizations related to various topical issues as well.

Although interest in data presentations is growing in the Azerbaijani media, its level is still not at the desired level in both traditional and social media environment. Monitoring of a number of television channels (AZTV, ATV, ARB 24, ITV, Real TV) and websites (Report.az, Modern.az, Axar.az, Qafqaz.info, Inter.az, Milli.az, Telegraf.com, Sputnik.az, BBC Azerbaijani) throughout 10 days (16.09.2023–26.09.2023) shows that the media subjects of Azerbaijan hardly use data presentations in their broadcasts or pages. For example, among the television channels, Azerbaijan State Television, ARB 24 and Azad Azerbaijan television channels benefit from data visualization to a certain extent. Other channels such as ITV, Real TV do not use data presentations totally. Thus, the data visualiza-

tions presented by Azerbaijan State Television and ARB 24 channels regarding economic news are simple and primitive. They mostly use simple tables. The data visualizations of the Margin.az site belonging to the ARB 24 channel are all of the same type. Therefore, the statistical data on the site are all the same, that is, the economic news are all drawn up in the same style and colour. According to the monitoring of the TV channels in Azerbaijan, weekly "Economic zone" program of Azad Azerbaijan television channel appeals to better visualization forms. Among the listed TV programs, the last one precisely ATV can be considered more professional than the others due to data presentations (AZTV, ATV, ARB 24, ITV, Real TV: 16.09.2023–26.09.2023). And almost none of the other local TV channels use the visualization of data statistics.

Internet media sites operating in Azerbaijan such as Report.az, Modern.az, Axar.az, Qafqaz.info, Inter.az, Milli.az, Telegraf.com, Sputnik.az, BBC in Azerbaijani use data presentations in different ways. Some of them rarely use data graphics. Thus, Sputnik.az, BBC Azerbaijani and Report.az sites provide some information through data visualization. A team is working on the Sputnik.az website related to the activity in question (Report.az, Modern.az, Axar.az, Qafqaz.info, Inter.az, Milli.az, Telegraf.com, Sputnik.az, BBC in Azerbaijani: 16.09.2023–26.09.2023).

Data presentations are not found in social profiles of various media subjects and personal pages of public figures. However, if we look at world practice, it is often possible to see various data visualizations on the pages of well-known media researchers on the Twitter platform. In general, we would be wrong if we say that Azerbaijan's social media space does not benefit from data journalism products. The main reasons for this deficiency are various. Mainly lack of professional staff, but also the fight for speed of news leads to a paucity of data-based submissions.

According to the representative of the MEDIA agency Parvana Ibrahimova, one of the main reasons for the lack of development of data journalism in Azerbaijan is related to the lack of teaching in the mentioned field, the lack of inclusion of that subject in the curriculum of all higher education institutions, and more profoundly the lack of good specialists: "The second reason is that this field requires sufficient funds. At the same time, since fast news is given more space in the modern news industry, there is little demand for it from the Azerbaijani audience. Therefore, data journalism is not given much space in our media space. However, as a MEDIA agency, we are preparing a certain strategic plan for the development of this area. This includes issues such as the training of quality specialists and the allocation of certain investments to media entities" (interview was taken in 10.10.2023). Well-known public figures, researchers in Azerbaijan rarely use data representations in their posts on social networks as well.

**Conclusions.** Communication science researchers predict that data journalism will be in the trends for a long time while speaking about the future of the media (Nic Newman. Digital news project, 2023: 5).

In this information age we live in, more and more data is produced and distributed every day. Therefore, it is increasingly important for journalists not to get lost in these piles of data and to be able to effectively convey this data to the audience by turning it into meaningful stories. Aware of this, media organizations are also in an interesting position to discover raw data, extract hidden stories from these data and increase trust in their news and try to develop data journalism (Rogers, Schwabish and Bowers, 2017: 13–15).

When it comes to telling data stories, compelling data visualizations are a must. This is where Infogram comes into play. By using Infogram to create visually appealing data visualizations, online media professionals can capture attention, make information easy to read, and increase engagement. It is easy to deploy visual content to multiple digital platforms with various sharing options. Simultaneously availability of data during the data collection phase is of particular importance. Availability or accessibility of data allows journalists to access information in various fields. This increases the effectiveness of journalistic research and allows journalists to obtain more accurate,

detailed and diverse information. In this regard, the importance of the concept of open data should be emphasized as well.

However, our research shows that the Azerbaijani media is not yet fully ready for this. In general, it can be said that journalists in Azerbaijan rarely use data presentations in traditional and social media. According to professionals working in this field, this is mainly due to the weak human resources and financial resources. Although there has been some progress, there are many points to be developed, including personnel potential, material resources, and technical issues.

Overall, data journalism is a fast-growing field that has the potential to revolutionize the way we consume news and information. It has become a vital tool for journalists to uncover hidden trends, patterns and otherwise overlooked insights.

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## TOPICAL SCIENTIFIC ISSUES

DOI <https://doi.org/10.30525/2592-8813-2024-1-32>

### UNIVERSITY SYSTEM FOR ENSURING ACADEMIC INTEGRITY: STRUCTURE AND ROLE OF STAKEHOLDERS

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*This article explores the critical role of a comprehensive and well-structured system for ensuring academic integrity within universities. It examines the key components of such a system, including transparent policies, effective communication strategies, robust reporting mechanisms, and fair and consistent disciplinary procedures. Furthermore, the article emphasizes the crucial roles of various stakeholders, such as students, faculty, administrators, and external stakeholders, in successfully implementing and maintaining a strong academic integrity culture. The paper highlights the importance of fostering a collaborative environment where all stakeholders share responsibility for upholding academic integrity. It also discusses the challenges and potential solutions in creating and sustaining a university's academic integrity culture.*

*This study investigates the critical elements of a robust university system for ensuring academic integrity. It examines the role of transparent and consistently enforced policies, such as academic integrity codes, in fostering a culture of integrity. Furthermore, the research delves into the importance of effective communication strategies, including educational campaigns, workshops, and open forums, to disseminate information about academic integrity policies and raise awareness among all stakeholders. The study also explores the significance of robust reporting mechanisms that allow students, faculty, and staff to report suspected violations of academic integrity confidentially and without fear of retaliation. Finally, the research emphasizes the need for fair and consistent disciplinary procedures that uphold the principles of justice and due process.*

*By analyzing the experiences of successful universities and identifying best practices, this research aims to provide valuable insights for higher education institutions seeking to enhance their academic integrity systems. The findings of this study can inform the development of more effective policies and procedures, improve communication and training efforts, and ultimately create a stronger foundation for academic excellence and ethical conduct within the university environment.*

**Key words:** *Academic integrity, university, stakeholders, policies, procedures*

**Introduction.** Academic integrity lies at the heart of higher education, fostering a culture of trust, honesty, and intellectual rigor. It is not merely a set of rules but a fundamental principle governing knowledge's pursuit. In an era of increasing globalization and rapid technological advancements, the challenges to academic integrity have become more complex and multifaceted. Plagiarism, fabrication of data, cheating on exams, and other forms of academic misconduct undermine the integrity of the educational process, erode public trust in higher education institutions, and hinder the advancement of knowledge. Therefore, establishing and maintaining a robust system for ensuring academic integrity is paramount for the success and reputation of any university (Fostering Academic Integrity-Minded Learning Environments, 2024; Mulenga & Shilongo, 2024).

Stakeholders play a crucial role in fostering an environment that promotes ethical behavior, accountability, and transparency within universities. These stakeholders include students, faculty, administrative staff, university leadership, accreditation bodies, and external partners such as employers and community organizations. Each group contributes uniquely to the overarching goal of uphold-



ing academic integrity, making their involvement essential for the effective functioning of the university system.

**Analysis of recent research and publications.** A strong system for ensuring academic integrity is not merely about detecting and punishing violations; it is fundamentally about creating a supportive and ethical learning environment where students are empowered to develop their intellectual potential honestly and responsibly. This requires a multifaceted approach encompassing clear and consistently enforced policies, effective communication strategies, robust reporting mechanisms, and fair and consistent disciplinary procedures. Moreover, fostering a culture of academic integrity necessitates actively engaging all stakeholders, including students, faculty, staff, and administrators (What to do when academic integrity concerns arise, n.d.; *Fostering Academic Integrity*, n.d.).

The ethical implications of academic misconduct extend beyond the individual student. It undermines the credibility of research findings, distorts merit-based evaluation, and erodes public trust in the integrity of higher education. Furthermore, it can harm the individual student, hindering their personal and professional growth. By upholding the principles of academic integrity, universities protect the integrity of their academic mission and contribute to the development of a more just and equitable society (Mulenga & Shilongo, 2024).

A comprehensive and well-functioning system for ensuring academic integrity is crucial for the success and reputation of any university. This system must be grounded in ethical principles, supported by clear policies and procedures, and actively engaged with all stakeholders. By fostering a culture of academic integrity, universities can cultivate a learning environment that encourages intellectual curiosity, critical thinking, and the pursuit of knowledge with integrity (What to do when academic integrity concerns arise, n.d.).

Academic integrity is not merely a set of rules imposed by the institution; it is a shared responsibility that requires all stakeholders' active engagement and collaboration. Students, faculty, staff, administrators, and even external stakeholders such as employers, accrediting bodies, and professional societies play crucial roles in fostering a culture of academic integrity. Students are responsible for upholding academic integrity by engaging in honest and ethical academic practices. At the same time, faculty members play a pivotal role in modeling ethical behavior, creating a supportive learning environment, and effectively addressing academic misconduct. Staff members, including academic support services and administrative personnel, provide resources, support, and guidance to students and faculty in navigating academic integrity issues. Administrators are responsible for establishing clear policies, implementing effective procedures, and allocating resources to support academic integrity initiatives. External stakeholders, such as employers and accrediting bodies, can influence institutional practices by setting expectations for academic integrity and recognizing institutions with strong commitments to ethical conduct (What is academic integrity? (n.d.); Nasrudin et al, 2021; Young, 2023; Kier & Ives, 2022).

The success of any academic integrity system hinges on the active participation and collaboration of all stakeholders. Effective communication and open dialogue are essential to ensure that the perspectives and concerns of all stakeholders are considered and addressed. This requires creating open communication and feedback platforms, such as faculty forums, student town halls, and stakeholder committees. Furthermore, fostering a culture of transparency and accountability is crucial, where all stakeholders understand their roles and responsibilities in upholding academic integrity (Bieliauskaitė, 2021).

Building a strong and sustainable system for ensuring academic integrity necessitates a collaborative and inclusive approach. By actively engaging all stakeholders, universities can create a shared understanding of the importance of academic integrity, foster a culture of ethical conduct, and ensure that all academic community members contribute to a positive and productive learning environment (How can stakeholders enhance academic integrity in the use of AI Tools? n.d.).

The success of any university system for ensuring academic integrity hinges on the active engagement and collaboration of all stakeholders. By fostering a culture of shared responsibility and open communication, universities can create a more ethical and equitable learning environment where all academic community members can thrive (Upholding academic integrity, n.d.).

**The aim of the article.** The purpose of this article is to describe the effective multilevel university system for ensuring academic integrity with the interconnected parts between horizontal and vertical units and the role of stakeholders in academic integrity promotion.

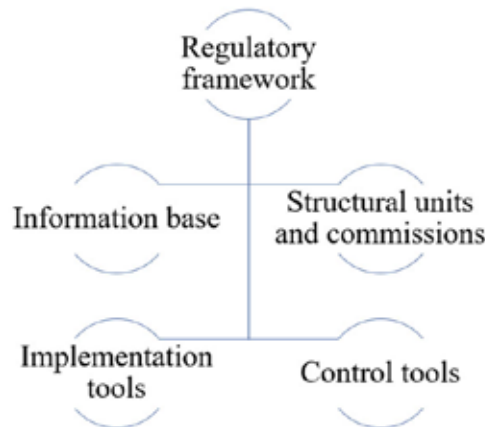
**Results and discussion**

*Multilevel university system for ensuring academic integrity.*

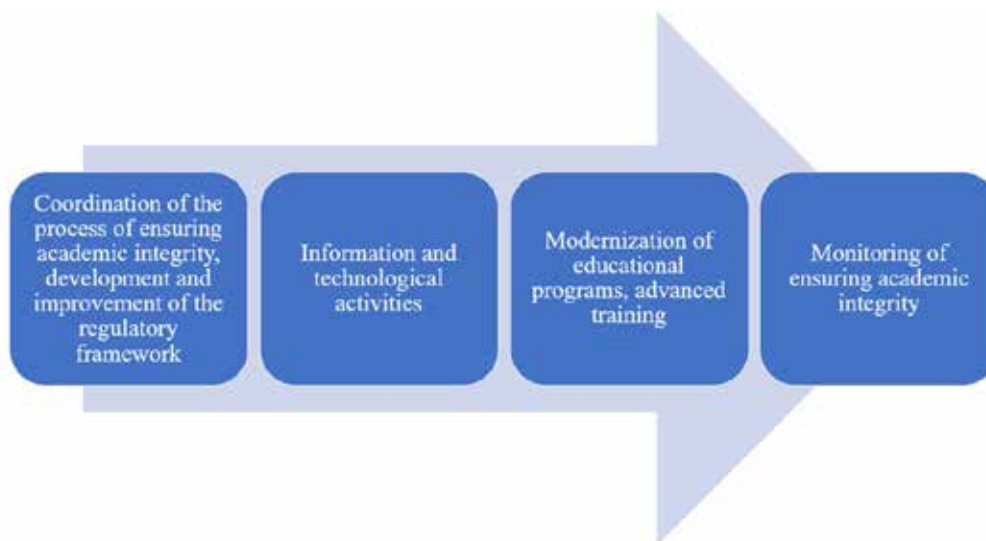
A multilevel university system for ensuring academic integrity is presented in three dimensions: as a framework (Figure 1), as a set of activities (Figure 2), and as a hierarchical structure (Figure 3).

Multilevel university system for ensuring academic integrity as a framework (Figure 1).

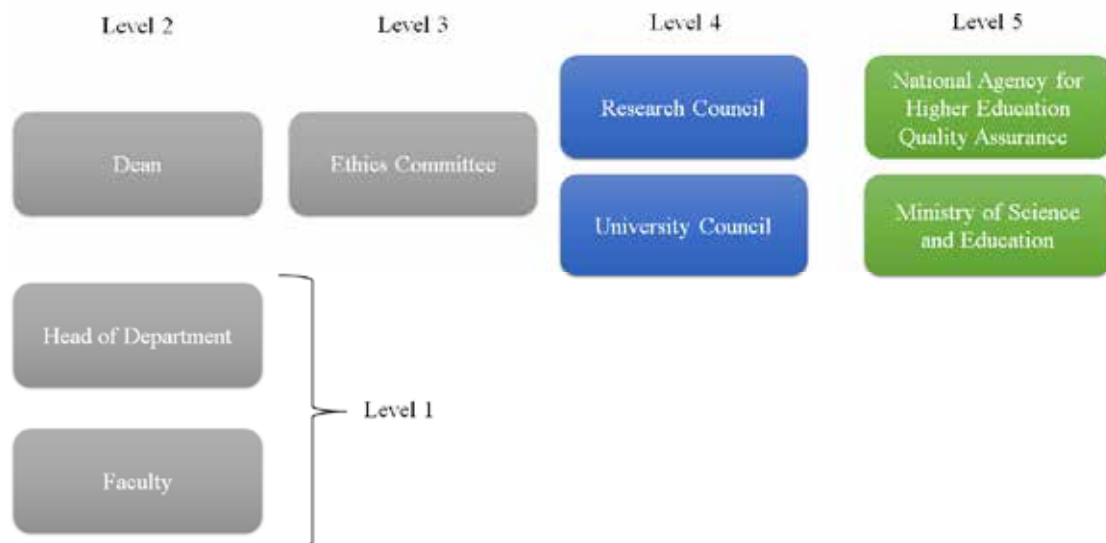
1. The regulatory framework unit includes formal documents like codes of conduct, academic policies, plagiarism prevention guidelines, and disciplinary procedures. It provides a structured basis for ensuring consistency in addressing violations and maintaining fairness across all levels.



**Fig. 1. Multilevel university system for ensuring academic integrity (framework)**



**Fig. 2. Multilevel university system for ensuring academic integrity (activities)**



**Fig. 3. Multilevel university system for ensuring academic integrity (hierarchy)**

2. The structural and commissions unit represents the organizational bodies tasked with implementing and overseeing academic integrity policies (integrity councils, ethics committees, or specialized offices within the university that address misconduct cases). Their role is to ensure that policies are applied effectively, with appropriate governance and decision-making processes.

3. A control tools unit is a set of tools and mechanisms used to monitor, detect, and prevent violations of academic integrity. They may include:

- systems for uniqueness checker programs and plagiarism detection mechanisms;
- systems for monitoring exam integrity, such as proctoring tools or AI-based surveillance;
- regular audits and assessments of academic practices;
- control tools act as safeguards to identify potential breaches and maintain accountability.

4. The implementation tools unit focuses on the practical application of academic integrity measures:

- training programs for students and staff;
- workshops or seminars on ethical practices in research and education;
- online modules or materials aimed at fostering awareness of academic standards.

These tools ensure that policies are theoretical and actively embedded into the university's culture.

5. Information base unit refers to the repository of knowledge, resources, and data used to support academic integrity:

- Databases of past misconduct cases and their outcomes.
- Educational resources about ethics and integrity.
- Research findings or statistics related to academic misconduct trends.

The information base serves as both a reference for decision-making and a learning resource for all stakeholders.

The regulatory framework serves as the core, guiding the activities of all other components. Structural units and commissions rely on the information base and implementation tools to ensure informed and effective decision-making. Control and implementation tools are practical components that enforce the principles outlined in the regulatory framework.

Multilevel university system for ensuring academic integrity as a set of activities (Figure 2).

1. Coordination of the process of ensuring academic integrity, development and improvement of the regulatory framework.

This block emphasizes the importance of centralized coordination and management. It suggests the need for a well-defined framework, policies, and procedures to guide the entire process of ensuring academic integrity. This block involves activities like policy development and review, standard setting and guidelines, collaboration with stakeholders (faculty, students, administration), and resource allocation for academic integrity initiatives.

2. Information and technological activities.

This block highlights the role of information and technology in supporting academic integrity efforts. It encompasses activities such as implementing plagiarism detection software, training on the ethical use of technology and online resources, data analysis, reporting on academic integrity violations, and disseminating information about academic integrity policies and procedures.

3. Modernization of educational programs, advanced training:

This block focuses on proactive measures to prevent academic misconduct. It includes activities such as integrating academic integrity education into curricula, developing students' critical thinking and research skills, providing faculty training on identifying and addressing academic misconduct, and promoting a culture of academic integrity within the university.

4. Monitoring of ensuring academic integrity.

This block emphasizes the importance of ongoing monitoring and evaluation. It involves activities such as tracking and analyzing data on academic misconduct cases, assessing the effectiveness of existing policies and procedures, identifying improvement areas, and conducting regular reviews and audits of academic integrity practices.

Multilevel university system for ensuring academic integrity as a hierarchy (Figure 3).

A hierarchical model includes:

1. Top-level governance: university leadership and governing boards ensure policies are implemented and resourced.

2. Mid-level oversight: faculties or departments administering integrity measures tailored to specific academic disciplines.

3. Operational level: day-to-day management of academic activities, where faculty and administrative staff ensure that students adhere to standards.

4. External oversight: accreditation bodies, employers, and the community provide validation and external accountability mechanisms.

*Stakeholders.*

Students are at the forefront of academic integrity initiatives. Their understanding and commitment to ethical standards directly influence the culture within educational institutions. Universities can cultivate a sense of ownership over their academic work by engaging students in discussions about plagiarism, cheating, and ethical research practices. Additionally, student-led organizations can advocate for integrity, promoting awareness campaigns and peer support systems that encourage adherence to ethical guidelines.

Faculty members also play a vital role in ensuring academic integrity. They are responsible for designing assessments that minimize opportunities for dishonesty and for modeling ethical behavior in their research and teaching practices. Faculty can implement clear policies regarding academic misconduct and guide proper citation practices and research ethics. Furthermore, ongoing training and professional development opportunities can equip faculty with the tools to address integrity issues effectively and foster a culture of trust in their classrooms.

Administrative staff and university leadership are instrumental in creating policies and frameworks that support academic integrity. So, it includes developing comprehensive honor codes, establishing reporting mechanisms for misconduct, and ensuring appropriate consequences for violations. Leadership must also prioritize transparency in decision-making processes related to integrity issues, reinforcing the institution's commitment to ethical standards. By fostering an institutional culture that values integrity, leaders can inspire confidence among all stakeholders.



External stakeholders, such as accreditation bodies and employers, further emphasize the importance of academic integrity in higher education. Accreditation bodies often assess institutions based on their commitment to ethical practices and may require evidence of effective integrity policies as part of their evaluation process. Employers also seek graduates who demonstrate strong ethical standards; thus, they are vested in supporting initiatives promoting academic integrity. Collaborations between universities and external partners can enhance programs to instill integrity values in students while preparing them for professional environments. The role of stakeholders in ensuring academic integrity within the university system cannot be overstated. Their collective efforts are essential for creating an environment where ethical behavior is valued and upheld. By actively engaging students, faculty, administration, and external partners in discussions about academic integrity, universities can strengthen their commitment to ethical practices and enhance their overall educational mission. As institutions continue to navigate challenges related to academic dishonesty in an increasingly digital world, fostering collaboration among all stakeholders will be critical for sustaining a culture of integrity in higher education.

### **Conclusions and prospects for further research.**

The framework component establishes the foundation, encompassing formal documents such as codes of conduct and plagiarism prevention guidelines. Structural units and commissions oversee implementation, while control and implementation tools ensure practical application. Finally, the information base serves as a repository of knowledge and resources.

The activities component emphasizes coordination, information technology utilization, educational program modernization, and continuous monitoring. These activities translate the framework into action through policy development, training initiatives, data analysis, and ongoing evaluation.

The hierarchical structure highlights the roles of various stakeholders. Top-level governance establishes policy and allocates resources. Mid-level oversight tailors integrity measures to specific disciplines. Operational-level faculty and staff enforce standards within classrooms and departments. Finally, external oversight from accreditation bodies and employers provides external validation and accountability.

Students, faculty, administrative staff, and external stakeholders contribute significantly to fostering a culture of academic integrity. Students' understanding of ethical practices and commitment to honest work are crucial. Faculty members model ethical behavior, design assessments that minimize dishonesty, and guide proper citation practices. Administrative staff and leadership establish frameworks and policies, while external stakeholders reinforce the importance of integrity through accreditation and employment expectations.

In conclusion, a multilevel university system with engaged stakeholders is essential for ensuring academic integrity. By working collaboratively, universities can create an environment that values ethical conduct, upholds its educational mission, and prepares students for success in a world that demands strong ethical grounding. As the digital landscape evolves, fostering collaboration among all stakeholders will be critical for sustaining a culture of integrity in higher education.

Further research should focus on several key areas: quantitative and qualitative evaluation of existing academic integrity systems, exploration of technology-enhanced approaches, investigation of the impact of different stakeholder engagement strategies, cross-cultural comparison of academic integrity systems, and longitudinal studies to assess the impact of academic integrity interventions.

**Acknowledgment.** The research is prepared in the frame of the project "AICE - With Academic Integrity to EU Values: Step by Step to Common Europe" (project number ERASMUS-JMO-2021-HEI-TCH-RSCH-101048055). This project is co-funded by European Union. The European Commission's support for the production of this publication does not constitute an endorsement of the

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Co-funded by  
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**Baltic Journal of Legal and Social Sciences.** Number 1 (2024).

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Izdevniecība "Baltija Publishing"

Valdeku iela 62-156, Rīga, LV-1058

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