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## THEORY AND PRACTICES OF LAW

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### PSYCHOLOGICAL STRUCTURE OF FORENSIC EXPERT ACTIVITIES

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**Abstract.** The development of modern society is accompanied by qualitative changes in all spheres of life, including the legal environment. The formation of professional morality, and ethical principles in a forensic expert is a requirement of the time, without them his conscientious activity aimed at protecting the constitutional rights and freedoms of every citizen is impossible. The article presents a thorough theoretical analysis of forensic expert activity. A classification of approaches to determining the content of the forensic expert activity is carried out, based on which the following working concept of forensic expertise is presented: this is a study by an expert based on special knowledge of material objects, phenomena, and processes that contain information about the circumstances of the case. It has been established that the effectiveness of the activities of a forensic expert depends on many factors, namely the presence of his special knowledge and skills. The main role of expert activity is determined by identifying evidentiary facts as a result of applying the expert's special knowledge to the object of study. This is a key element that distinguishes forensic expert activity. Having determined which areas are the most important in the professional activity of a forensic expert, it is possible to improve the state of training of specialists in forensic activity and ensure the effectiveness of conclusions in the work of experts. Therefore, we have developed a model of the psychological structure of forensic activity, which includes cognitive, constructive, organizational, and communicative activities. The formation of the components presented in the model is the key to the professionalism of forensic experts and the independence of their conclusions.

**Key words:** forensic expert, criteria of professional activity, forensic expert opinion, expert activity, impartiality of the judicial opinion, professionally important qualities.

**Introduction.** After adopting the Law of Ukraine "On Forensic Expertise" in 1994, there was an active development of methodological, legal organizational, and managerial areas of forensic expertise in Ukraine. This law determined that the main goal of justice is independent and qualified expertise, which combines the high professional training of the expert and skillful use of technical means for an independent conclusion. Given the current circumstances and the war in Ukraine, forensic expertise is gaining particular relevance in the investigation of criminal offenses both within Ukraine and among Ukrainians from the aggressor country.

Today, expert services work in extremely difficult conditions of martial law, since the constant crimes of the enemy and the general state of danger prevailing in Ukraine increase the burden on forensic experts, who take an active part in recording illegal actions and ensuring that criminals are brought to criminal responsibility. All this proves that forensic activity is an integral part of the state security of Ukraine. This leads to increased requirements for the level of professionalism of a forensic expert, his knowledge and skills, and the ability to meet the established criteria for expert activity. This is what determines the relevance of the topic and the need to develop a structural model of the professional activity of a forensic expert, which will allow classifying the main areas and types of his activity.

Therefore, **the purpose** of the work is a theoretical analysis and development of a model of the psychological structure of forensic activity.

**Main part.** Forensic activity is on the verge of combining such branches of science as criminalistics, forensic expertise, psychology, sociology, technical sciences and information technologies. At the legislative level, the essence of forensic examination is defined by the Law of Ukraine “On Forensic Examination” (Article 1). In particular, it states that forensic expertise is “an expert’s study based on special knowledge of material objects, phenomena, and processes that contain information about the circumstances of a case that is being conducted by the bodies of inquiry, pre-trial, and judicial investigation” (Law of Ukraine, 2025). The same Law states that a forensic expert can be a specialist who has the necessary knowledge to provide a conclusion on the issue under investigation. Thus, we see that a forensic expert cannot have a narrow specialization, since he must have a wide range of skills, knowledge, and abilities. Based on this, let’s consider the main structural elements of the forensic expert’s activity that allow him to be an effective professional. According to I. Pyrih, expert activity is “a specific type of human activity based on scientific knowledge, the content of which is the study of certain objects, processes or phenomena using special methods to provide scientifically sound conclusions” (Pyrih, 2015, p. 17). Y. Piliukov sees expert judicial activity as a multifaceted and complex process of studying objects, during which scientifically substantiated conclusions are formed using many tools regarding the reliability of facts, phenomena, or properties in the process of investigating criminal offenses (Piliukov, 2020, p.160).

Forensic expert activity is a rather complex structure carried out in the process of legal proceedings by forensic experts. It combines and interrelates many types of human activity: cognitive, mental, and psychological, which are aimed at solving the main task – providing assistance to law enforcement agencies in establishing the circumstances that are subject to proof in a specific case. In each of the many areas of forensic expert activity, the competence and competence of the forensic expert, which is manifested in various aspects, is necessarily taken into account.

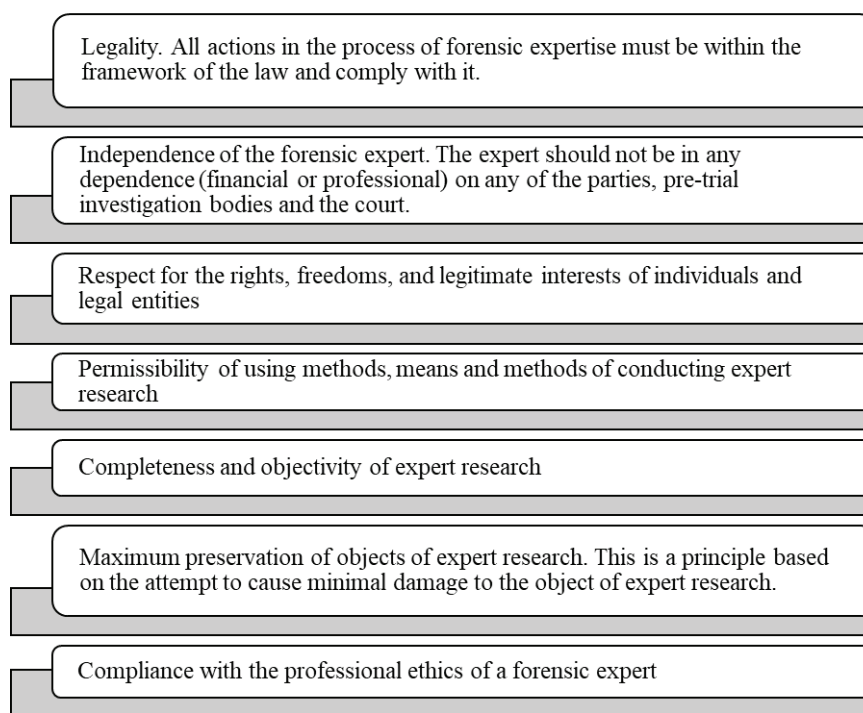
V. Mykhailov defines forensic expertise as an important basic basis in the interpretation of legislation, which fills gaps in procedural law and contributes to the improvement of the forensic expertise system as a whole. In a narrow sense, the scientist interprets forensic expertise as the activity of individuals or legal entities to ensure independent justice using objective qualified expertise (Mykhailov, 2023, p. 155). The author argues that in forensic expertise it is important to adhere to the principles that serve as the fundamental guideline for the effectiveness of conclusions in court cases (Fig. 1).

These principles form the basis of forensic expertise and allow experts to follow the specified procedure in each case. It follows that forensic experts must make qualified observations and conclusions, minimally compromised by bias, to provide reliable and accurate conclusions to the courts. However, there is little data in this field on how well forensic experts perform these tasks, partly because there has been no clear basis for a systematic study of their experience. In particular, due to the lack of a clear psychological structure of forensic expertise. Being a multi-level system, forensic expertise involves the reception, processing, and transmission of information received by the forensic expert through the application of his acquired specialized knowledge. The quality and reliability of the expert's conclusion are significantly influenced by his mental characteristics, intellectual abilities, social position, and emotional component. Thus, the professional activity of a forensic expert is a certain set of physical actions and mental processes carried out by him (Malyk, 2009, p. 113).

At this stage, the following urgent problem arises: the training of forensic experts. First of all, this depends on the fact that expert activity is largely regulated by procedural legislation, therefore, theoretical and methodological provisions that determine the scientific basis of individual types of forensic examinations are developed not only on the principle of comprehensive use of data from natural and technical sciences, but also taking into account the generally binding conditions of procedural legislation. Thus, it becomes obvious that a forensic expert, entering into relations with other subjects of legal proceedings, has as its main goal the establishment of facts of objective reality, and this, of course, entails specific psychological features of expert activity. To determine these features,



it is necessary to start from the system of general characteristic features of the expert's activity, since both of these elements of the psychological portrait of the expert's personality are closely interrelated.



**Fig. 1. Principles of forensic examination (according to V. Mikhailov)**

Today, among the general elements of the activity of a forensic expert, they note: the social nature of expert activity and the purposefulness and systematicity of this activity. The social nature of the expert activity is manifested in the fact that the institute of forensic examination in the modern judicial system acts as one of the most important factors in increasing the efficiency and fairness of the entire judicial system. The social nature of expert activity is also manifested in the scientific foundation of the theory and practice of forensic examination, because any branch of knowledge, from a global perspective, is based in its content on the achievements of mankind throughout the history of the formation of sciences (Petrova, Sniherov, 2018). The main vector of expert activity is that, in conducting research, the expert provides answers to the questions posed to him, thereby contributing to justice. An important element of forensic expertise is also its systematic nature: expertise is assigned and conducted in a strictly regulated manner by law, and the determination of an expert institution and an individual expert to conduct the necessary research depends on the type of expertise, qualifications and specialization of the expert himself (Shevtsov, Lozova, 2011, p. 127). A. Piskunova, studying the features of making judicial decisions by an expert, argues that the main factors influencing the effectiveness of the expert's work are his intelligence and social orientation. The author emphasizes that “the psychology of the expert's activity cannot be considered without studying his mental characteristics” (Piskunova, 2019, p. 319). At the same time, the psychological characteristics of the expert's activity combine properties and qualities that are formed under the influence of the conditions of his professional activity. This includes clear legal regulation of professional activity; ensuring official secrecy; conducting expertise in conditions of increased interest or pressure from third parties; conditions of psychological and physical workload, as well as (as for the situation in Ukraine) in difficult circumstances of war. As we can see, forensic examination is a complex psychological process in which the expert must think through the techniques and methods that should be applied in a specific situation, as well as skillfully use the



forecasting method. The formation of the expert's internal conviction and the formulation of expert conclusions deserve special attention. Without considering in detail all the components of the expert's internal conviction, since they have been studied in several works by scientists, let us recall that the expert's internal conviction is "a psychological, emotional and intellectual state, which consists in a feeling of confidence in the correctness of the applied knowledge, expert methods, techniques and in the correctness of the conclusions drawn by him" (Chepa, 2007, p.292).

The formation of internal conviction is the basis of the conducted research, the study of the presented samples, expert experiments, and, if necessary, the case materials. The expert, when analyzing the entire process, proves how convincing the signs he has identified are and whether they confirm the reliability of the formulated conclusions. Internal conviction is characterized by a firm confidence in the truth of the results obtained, which objectively reflect the state of proof of the event, fact. When conducting a forensic examination, an important place is occupied by psychological factors and mental processes of the forensic expert (for example, perception, representation, attention, memorization, intuition, heuristics, etc.). They determine the features of his activity and his functional capabilities. Heuristic thinking is of particular importance in the cognitive process, since the expert constantly puts forward working hypotheses, checks them, rejects them, and puts forward new ones until he eliminates all contradictions or doubts and is convinced of the correctness of his judgments and conclusions. Psychological features also include the expert's assessment of the results of the conducted research. It is a rather complex mental process in which the previous stages of his cognitive activity are implemented. On its basis, an evaluative judgment about the meaning of the information received is first formed, and then a conclusion based on the data objectively obtained as a result of the conducted research. It should be noted that when forming conclusions, an important component is the procedural autonomy and independence of the expert, which is a guarantee of the objectivity of the conclusion (Dror, Murrice, 2018, p.16).

The organization of complex examinations is especially difficult from a psychological point of view if they are conducted by a commission. The head of the expert institution creates a commission of relevant specialists to conduct a comprehensive examination and must consider which of them to appoint as the leading expert. At the same time, he needs to know the psychological characteristics of such an expert, his level of knowledge, and how communicative he is in relations with colleagues. This is an important psychological component, since various situations may arise in the work of the commission (incompatibility between commission members, lack of cohesion between them, trust/distrust of the results, etc.). The leading expert is assigned an important role in organizing the examination process, and here the psychological aspect is very important, which he must respond to. For example, in the event of a conflict between commission members, he must skillfully, using his professional knowledge, explain, convince, and direct the work of experts to fulfill the general task set before him. He must adhere to the ethics of behavior so that these actions do not degrade the dignity of commission members, and that the results obtained are used to the maximum.

An important place during comprehensive examinations is occupied by the assessment of all the results obtained. A collegial discussion of the results obtained by each specialist in the commission may not always immediately lead to a common opinion. Existing disagreements should be carefully checked, except for erroneous judgments or doubts about the results obtained. In some cases, an expert with little work experience may not notice the mistake of an expert with extensive work experience and trust his results (Azarov, Rafalskyi, 2014, p. 88). In this regard, N. Tkachenko argues that a forensic expert, in addition to having special knowledge, must possess personal moral, ethical and professional qualities that will contribute to the effective performance of his professional activities. N. Tkachenko notes that the psychological side of the forensic expert's activities is determined by the peculiarities of professional activity and the circumstances to which the expert must adapt and find the opportunity to work effectively in such conditions (Tkachenko, 2019, p. 208) (Fig. 2).



**Fig. 2. Features of the professional activity of a forensic expert (according to N. Tkachenko)**

Given the highlighted features of the activities of forensic experts, it is worth noting that such specialists perform their duties in conditions of time shortage, the influence of particularly strong stimuli on them and the dominance of negative emotions in the absence of positive ones, increased responsibility in decision-making and the need for urgent measures, etc. At the same time, the above conditions are simultaneously determined by the nature of the forensic expert activity as a separate type of profession and also give rise to new difficulties in the course of implementing this activity. The conditions for the implementation of their tasks by subjects of forensic expert activity can arise under the influence of both objective and subjective factors.

An example of these factors may be the impossibility of fully predicting changes in their professional activity, which leads to an uneven workload of specialists in different periods; the presence of regulatory and legal regulation of the deadlines for the implementation of the list of actions and measures provided for within the framework of conducting a forensic examination; the presence of problems with the staffing of specialists (staff turnover, insufficient professional and psychological potential); inadequate level of material and technical support of specialists, etc. (Zaiats, Chechil, Kishko, 2023, p. 97).

Considering the features of the expert's activities, one can distinguish the psychological features of his personality, with the help of which he solves the set professional tasks (Petrova, Sniherov, 2018, p. 18): 1) properties of cognitive processes: thinking (analytical, i.e. the ability to study the objects of expert research, the ability to choose research methods depending on the type of object): criticality, logic, the ability to notice contradictions; speech: oratory skills, language culture, imagery, expressiveness, discursiveness, mastery of professional terminology and the ability to explain special terms during a speech in court; perception and attention: observation, distribution, switching, the ability to high concentration of attention; memory (volume of professional experience, efficiency, i.e. the ability to quickly obtain the necessary special expert knowledge); imagination: imagery, forecasting, reproduction, creativity; 2) properties of regulatory processes: humanism, honesty, perseverance, stress resistance; 3) properties of communicative processes: social activity, ability to dialogue, informativeness (volume and speed of information processing), verbal activity, tolerance. Complementing the highlighted list, it is worth adding that a forensic expert must be independent of the pre-trial investigation bodies, the court, and other participants in the process.

Therefore, his independence must be ensured by the state by creating the necessary conditions for his activities and providing him with proper material and social support. As in any other profession, the professionalism of forensic experts lies in possessing the appropriate means, skills, and work operations. In psychology, they are usually divided into two separate, but at the same time interconnected stages: skill (action, the basis of which is the practical application of the acquired knowledge)

and skill (formed automatic action, which does not require conscious control of special volitional efforts for its implementation). The level of development of this knowledge, skills, and abilities determines the general culture of a person, as well as his professional skills. At the same time, emphasis is placed on the fact that the professionalism and skill of a forensic expert are based on professional and psychological competence. This competence is a multi-structural phenomenon in its content.

N. Tkachenko includes three areas in the composition of the professional and psychological competence of a forensic expert, each of which consists of separate components. The first sphere is motivational (includes personal and motivational competence, general cultural competence, and social competence), the second is subject-practical (methodological competence, practical and activity competence, didactic and methodological competence, special-scientific competence, economic and legal competence, ecological competence, ideological competence, information competence, managerial competence, communicative competence), the third is the sphere of self-regulation (psychological competence, self-assessment, auto-competence) (Tkachenko, 2019, p.208).

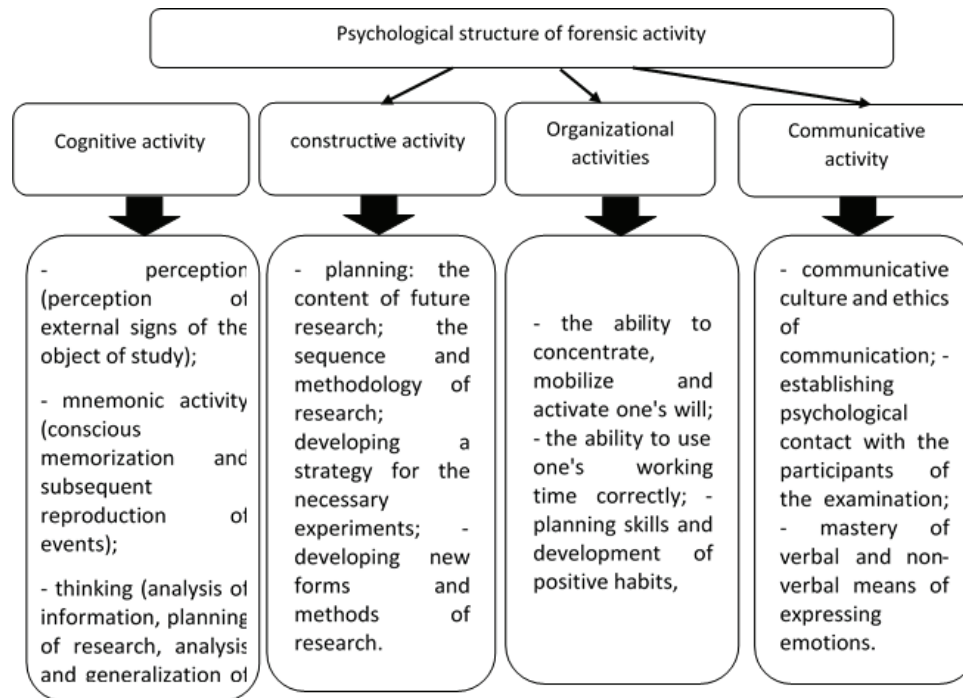
Analyzing the psychological sphere of training of a forensic expert as a whole, I. Dror and D. Murray identified several components in the structure of the work of an expert psychologist, such as motivational, diagnostic, and analytical. The motivational component provides the direction of the professional activity of a forensic expert. This includes his values, interests, needs, motives, means of self-development, planning of activities, and abilities for self-regulation. The diagnostic component involves the ability to select research methods, the means that are needed for this and to conduct research activities according to the assigned work task. The analytical component includes the ability to analyze information, generalize, systematize facts, substantiate hypotheses, and use techniques for their confirmation or refutation. The latter component, in particular, includes the cognitive abilities of the expert and directly determines the success of the conclusions made by him (Dror, Murrice, 16, p.18).

So, based on the theoretical analysis of scientific approaches to the problem of the psychological component of the forensic expert's activity and taking into account our developments, a model of the psychological structure of the forensic expert's activity has been developed (Fig. 3).

When conducting a forensic examination, regardless of its direction, the expert's cognitive activity is divided into three main stages (Akhtyrskaya, 2007, p. 5). The first stage includes knowledge of the facts necessary to answer the question posed to the forensic expert. At this stage, the forensic expert perceives the available information about the objects of the expert study and establishes the content of the questions posed to him. In this regard, it may be necessary to obtain additional information from the body that appointed the examination, or the forensic expert may conclude that the questions posed go beyond his competence or the field of knowledge in which he specializes. It happens that the scientific arsenal lacks tools or knowledge that would allow answering the question posed, which also makes it impossible to conduct further expert research. In the second stage, studies are conducted that allow obtaining additional information about the objects of the examination by using the forensic expert's special knowledge. At this stage, the primary importance of the cognitive activity of a forensic expert is the methods of observation and comparison recorded in the corresponding description.

The second stage is completed by the analysis of the information received, during which the forensic expert forms a certain belief about the significance of known facts for solving the tasks set before him. The third, and final stage of the cognitive activity of a forensic expert is the preparation of an expert's conclusion, which sets out the conclusions drawn based on known facts and beliefs. In addition to cognitive activity, in the professional practice of a forensic expert, his constructive activity takes place, which consists in planning the course and possible results of his research. Each action of a forensic expert is the result of purposeful efforts. Before conducting an expert study, the forensic expert mentally draws up a plan and determines the sequence of further actions necessary to obtain an answer to the question. Therefore, the constructive activity of a forensic expert consists of

planning work, which is a necessary condition for forensic expert activity. The constructive activity of an expert includes planning: the content of future research; the sequence and methodology of research; and developing a strategy for the necessary experiments. The constructive activity of an expert consists in planning his work. In the planning process, an activity is previously created in the planner's imagination, which is carried out in real actions. Planning carried out by an expert in the process of constructive activity can be divided into prospective, current, and planning for the production of a specific examination. Prospective planning is carried out within the framework of the general plan of the expert institution in which the expert works (Akhtyrskaya, 2007, p. 6).



**Fig 3. Model of the psychological structure of the forensic expert's activity**

Current planning is carried out by the expert taking into account the examinations and other tasks that are in his production. Usually, it covers a relatively short period (week, month). Planning for the production of a specific examination includes several stages. The first stage is familiarization with the resolution on the appointment of the examination and establishing the principle possibility of its implementation, taking into account the specialization, competence of the expert, and the sufficiency of the materials presented. In the second stage, the expert determines when he will be able to proceed with this examination and whether he is provided with the technical means necessary for its production. In the third stage, taking into account the accepted stages of performing this examination and the requirements of the research methodology for this type of object, the sequence and nature of the necessary studies are planned.

The organizational activity of a forensic expert is directly related to constructive activity. Its content consists of organizing the process of his work and conducting complex or commission studies. Such activity enables the specialist to implement the tasks and plans set in practice. The organization of a forensic expert's work involves the ability to concentrate, mobilize, and activate his will, and to use his working time correctly. The issue of communicative culture is becoming increasingly relevant today, as one of the defining properties of a modern person, which occupies a prominent place in the general cultural formation of a person. In this regard, one of the most important aspects of professional education in general and special training of forensic experts, in particular, is the training of specialists



who have a communicative culture, which ensures the establishment of communications and further mutual coordination of actions in professional activities. Yu. Malik also points out the dependence of professional culture on the level of communicative culture. She suggests distinguishing two components of communicative culture: activity, which characterizes the importance of values, knowledge, skills, and qualities of the individual for effective professional activity; communicative, which determines the importance of these components for the implementation of effective professional communication (Malyk, 2009, p. 155). When considering the psychological features of forensic expert activity, one cannot ignore such issues as the professional ethics and etiquette of a forensic expert, which are based on several psychological components. Professional ethics reflects moral norms and moral principles that an expert must adhere to, both in the process of his activity and procedural subjects. This is, first of all, principledness, objectivity, impartiality, independence, and self-criticism. Professional ethics reflects moral norms and moral principles that an expert must adhere to, both in the process of his activity and procedural subjects. We also note that one of the forms of professional morality in forensic expertise is the service etiquette of an expert. It has its specific features in any profession, including in the professional activity of an expert. As for the figure of an expert, he must be characterized by correct behavior both with procedural subjects and with the head of the expert institution and with colleagues. The features of service etiquette include such moral qualities as accuracy, and language etiquette, which includes content, logic, demonstrability, clarity, and comprehensibility, in particular when using terms and concepts that must be understandable to all procedural subjects when familiarizing themselves with the expert's conclusion (Azarov., Rafalskyi, 2014, p. 90).

Moral requirements for an expert oblige him to continuous professional development, study of scientific and methodological literature in the specialty and related sciences, and use of his own experience and the experience of colleagues. In addition, a moral requirement is to provide professional assistance to colleagues and transfer their experience to young novice psychologists when conducting complex examinations. A forensic expert independently performs expert studies and makes decisions on the examination, in turn, the conclusion of the examination affects the fate of the sub-experts, as well as indirectly the fate of loved ones. This imposes additional responsibility on the expert and, of course, only a high level of special psychological knowledge gives him the moral right to make independent responsible decisions in the examination process. Expert research takes place in direct contact with other persons, which determines the implementation of several ethical norms of interaction and communication.

These norms are associated with such important ethical principles: respect for the rights of the individual, honor and dignity, independence from judicial and investigative bodies, as well as from other participants in the criminal process, from other experts, and confidentiality (Cheremnova, 2023, p.217). Taking into account all of the above, we can argue that the work of a forensic expert is psychologically stressful and requires significant psychological efforts and the possession of general and special professionally important and personal qualities.

In this regard, I. Petrova and O. Sniherov argue that it is worth paying active attention to the training of forensic experts, among which he highlights the need to form such moral and volitional qualities as purposefulness, psychological stability in stressful situations, analytical and creative thinking, the ability to determine cause-and-effect relationships, responsibility and efficiency in decision-making (Petrova, Sniherov, 2018, p. 19).

**Conclusions.** Forensic expert activity belongs to the category of professions that involve the performance of official duties in intense, extreme, and stressful conditions. Based on this, it is characterized by all the same features as other types of critical activity: lack of time; the impact on specialists of especially strong stimuli and the dominance of negative emotions with a lack of positive ones; increased responsibility in decision-making and the presence of situations of urgent application of measures. The specificity of the activity of a forensic expert is that its implementation

often occurs in situations with an unpredictable outcome, associated with the increased responsibility of the forensic expert for actions. These specific features of the activity have a significant impact on the personal characteristics of forensic experts. A forensic expert as a subject of forensic expert activity and as a subject of responsible professional and moral actions is obliged to realize, feel, and remember his responsibility. The relationship of responsible dependence, which a forensic expert enters into in the process of conducting a forensic examination, is of an objective nature, which is especially clearly manifested in the analysis of his activities when he deals with an area of increased responsibility and must express and demonstrate a measure of responsibility. This is manifested in the rigor, accuracy, richness of argumentation, depth, objectivity, and truthfulness of expert research, in the positive impact of the expert opinion on establishing the truth in criminal proceedings. He is obliged to treat his work objectively and fairly, to present a conclusion by the concepts of professional ethics and conscience. The expert bears legal (criminal, disciplinary) moral and ethical responsibility for the results of his activities. Therefore, the psychological side of forensic expert activity contains the main structural components that reflect each construct of his activity, which ensures its effectiveness.

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## CLOSURE OF CRIMINAL PROCEEDINGS ON THE GROUNDS OF EXPIRATION OF THE PRE-TRIAL INVESTIGATION: ANALYSIS OF CERTAIN LEGISLATIVE INITIATIVES

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**Abstract.** This article analyzes legislative initiatives to improve criminal proceedings in terms of the pre-trial investigation period and the legal consequences of its completion in accordance with the Draft Law "On Amendments to the Criminal Procedure Code of Ukraine and the Law of Ukraine 'On the Public Prosecutor's Office' regarding the removal of obstacles to access to justice for parties to criminal proceedings" No. 12367 of 30.12.2024 and alternative draft laws No. 12367-1 of 08.01.2025, No. 12367-2 of 14.01.2025, No. 12367-3 of 14.01.2025. The author analyzes certain aspects of the development of the statutory regulation of the pre-trial investigation period and the substantive characteristics of the proposed amendments to the criminal procedure legislation. The author presents the positions of scholars, lawyers and representatives of civil society on the proposed changes. It is substantiated that the existing mechanism of closing criminal proceedings on the basis of expiration of the pre-trial investigation term encourages the prosecution to conduct pre-trial investigation within a reasonable time, which is fully consistent with the objectives of criminal proceedings, complies with the provisions of international treaties, the case law of the European Court of Human Rights and meets the general principles of criminal proceedings. Given the systematic analysis of the criminal procedural legislation of Ukraine, the author makes critical remarks on the unreasonable proposals of legislative initiatives.

**Key words:** terms in criminal proceedings, grounds for closing criminal proceedings, suspect, prosecutor, investigating judge, court.

**Introduction.** In criminal proceedings, certain procedural deadlines are established within which the participants in criminal proceedings are obliged or entitled to make relevant procedural decisions or perform certain procedural actions. One of such procedural deadlines established by the criminal procedural legislation of Ukraine is the pre-trial investigation.

At the same time, one of the tasks of criminal proceedings is to apply due process to all participants in criminal proceedings, which implies strict observance of the pre-trial investigation period in all modes of criminal proceedings, especially in the absence of the suspect, which is characterized by additional guarantees of the suspect's (accused's) rights.

In recent years, the legislative regulation of the pre-trial investigation timeframe, both in terms of the types of timeframes and the procedure for their calculation and extension, has been repeatedly amended.

At the same time, the reform of the pre-trial investigation terms in criminal proceedings is currently actively ongoing, as evidenced by the relevant legislative initiatives.

**Main part.** The purpose of the study is to provide a scientific analysis of the Draft Law "On Amendments to the Criminal Procedure Code of Ukraine and the Law of Ukraine 'On the Public Prosecutor's Office' regarding the removal of obstacles to access to justice for parties to criminal proceedings" No. 12367 of December 30, 2024 and alternative draft laws No. 12367-1 of January 08, 2025, No. 12367-2 of January 14, 2025, No. 12367-3 of January 14, 2025, and to formulate conclu-

sions regarding the expediency of its adoption. The object of the study is public relations which are proposed to be regulated by the draft law No. 12367 of December 30, 2024 and alternative draft laws No. 12367-1 of January 08, 2025, No. 12367-2 of January 14, 2025, No. 12367-3 of January 14, 2025. The subject of the study is an analysis of certain legislative initiatives on closing criminal proceedings on the basis of expiration of the pre-trial investigation.

Given the objectives, object and subject of the study, the following methodological tools were used in the course of its implementation: bibliographic method – for analyzing publications on the subject matter of the study; methods of system analysis – to reveal the content of legal provisions used in the course of the study; comparative legal method – to compare legal regulation in retrospect and proposed changes; formal legal method – to analyze the provisions of acts of national legislation of Ukraine with a view to clarifying

**Discussion.** The issue of the pre-trial investigation timeframe has been thoroughly studied by domestic scholars, including: Y. Alenin, L. Vasyliiev, V. Voloshyna, I. Hloviuk, V. Hryniuk, A. Huliayev, H. Hrytsak, O. Drozdov, O. Drozdova, S. Zaika, I. Zinkovskyi, E. Kovalenko, S. Kovalchuk, V. Kozii, O. Kornaha, L. Loboyko, T. Lukashkina, I. Mytrofanov, E. Nemchynov, V. Pavlovsky, D. Pysmennyi, N. Rohatynska, V. Rozhnova, H. Sysoyenko, V. Tomin, O. Torbas, O. Torbas, S. Fomin, M. Khavroniuk, I. Tsyupryk, I. Shcherbak, H. Yurkova, D. Yahunov, R. Yakupov, and others.

Given the repeated changes in the legal regulation of the institute of pre-trial investigation terms in criminal proceedings and current attempts to further reform it, further scientific research of this issue remains extremely important.

With a view to determining the vector of current legislative proposals, it is necessary to analyze the legal regulation of the pre-trial investigation terms in criminal proceedings and their enforcement in retrospect.

The Law of Ukraine “On Amendments to the Commercial Procedure Code of Ukraine, the Civil Procedure Code of Ukraine, the Code of Administrative Procedure of Ukraine and Other Legislative Acts” No. 2147-VIII of 03.10.2017 introduced, in particular, the following innovations

- the pre-trial investigation period was differentiated into: 1) the period from the moment of entering information about a criminal offense into the Unified Register of Pre-trial Investigations until the day of serving a person with a notice of suspicion and 2) the period from the moment of serving a person with a notice of suspicion until the day of filing an indictment, a motion for the application of compulsory medical or educational measures, a motion for the release of a person from criminal liability or until the day of making a decision to close criminal proceedings;

- part 1 of Article 284 of the CPC of Ukraine was supplemented by paragraph 10, according to which criminal proceedings shall be closed after serving a person with a notice of suspicion if the pre-trial investigation period specified in Article 219 of the CPC of Ukraine has expired, except in the case of serving a person with a notice of suspicion of committing a grave or especially grave crime against the life and health of a person

- clause 2 of part 3 of Article 314 of the CPC of Ukraine was amended, according to which in the preparatory court hearing the court has the right to decide to close the proceedings in case of establishing the grounds provided for in clauses 5-8, 10 of part 1 of Article 284 of the CPC of Ukraine (Law No. 2147-VIII, 2017).

These legislative changes were called “Lozovyi's amendments” in the media and among lawyers, after the name of their author, MP Andrii Lozovyi.

There was no unanimity among scholars and lawyers in assessing such innovations, which led to repeated amendments and additions.

Zinkovskyi I. critically assessed the fact that two regimes of pre-trial investigation terms were introduced into the criminal procedure legislation, given that this could have a destructive impact on the protection of the rights of victims of criminal offenses and the effectiveness of pre-trial investi-

gation in general. According to the scholar, this regulatory framework will not be able to achieve a reasonable balance of public and private interests in criminal proceedings (Zinkovskyi, 2018: 94).

At the same time, O. Drozdov and O. Drozdova were somewhat concerned about the changes concerning the timing of the pre-trial investigation. Thus, according to the scholars, closing a case by an investigator if no one has been notified of suspicion within a year actually relieves the state of the obligation to investigate crimes, which is certainly contrary to international standards. If a person does not hide from the court and the investigation, a certain period of time passes, depending on the severity of the crime, taking into account the rules on statutes of limitations, his or her criminal prosecution should be terminated (Drozdov, Drozdova, 2017: 24).

At the same time, I. Fomin, a representative of the bar community, a member of the Ukrainian National Bar Association's Committee for the Protection of Human Rights, positively assessed the changes in the legal regulation of pre-trial investigation terms and noted that for a long time almost all changes in criminal procedure legislation were repressive, but the only exception was the Lozovyi amendments. According to the lawyer, this was the only legislative attempt in recent years to somehow limit the monopoly of the repressive apparatus on violence in time, and to protect the rights of people and businesses that are directly or indirectly under pressure from criminal prosecution (Fomin, 2023).

Court practice has shown that the mechanism of closing criminal proceedings by the court due to the expiration of the pre-trial investigation at the stage of the preparatory hearing is an effective means of protecting the rights and legitimate interests of the participants, especially the defense.

At the same time, the Lozovyi amendments have been gradually abolished.

Thus, the Law of Ukraine “On Amendments to the Criminal Procedure Code of Ukraine and Other Legislative Acts of Ukraine on Strengthening the Independence of the Specialized Anti-Corruption Prosecutor's Office” No. 3509-IX of December 08, 2023, which entered into force on January 01, 2024, abolished the Lozovyi amendments in terms of the pre-trial investigation period from the moment of entering information about a criminal offense into the URPTI or issuing a decision to initiate a pre-trial investigation until the day the person is notified of suspicion (Law No. 3509-IX, 2023).

At the same time, even after these legislative changes, the discussion on further reforming the pre-trial investigation timeframe continued.

On December 30, 2024, the Cabinet of Ministers of Ukraine initiated the registration of the Draft Law “On Amendments to the Criminal Procedure Code of Ukraine and the Law of Ukraine ‘On the Prosecutor's Office’ to remove obstacles to access to justice for parties to criminal proceedings” No. 12367 (Draft Law No. 12367, 2024).

According to the explanatory note, it was prepared with the aim of improving the criminal procedure legislation in terms of the terms of pre-trial investigation and appealing the closure of criminal proceedings.

According to O. Stefanishyna, this draft law was developed to implement the Letter of Intent and Memorandum of Economic and Financial Policies between Ukraine and the IMF of June 17, 2024 and the Letter of Intent and Memorandum with the IMF of October 04, 2024, and therefore the exclusion of the expiration of the pre-trial investigation after the notification of suspicion as a ground for closing the proceedings is in line with international obligations (Mamchenko, 2025).

At the same time, a number of alternative draft laws were also registered for the same purpose: No. 12367-1 of January 08, 2025 (Draft Law No. 12367-1, 2025), No. 12367-2 of January 14, 2025 (Draft Law No. 12367-2, 2025), and No. 12367-3 of January 14, 2025 (Draft Law No. 12367-3, 2025).

The National Anti-Corruption Bureau and the Specialized Anti-Corruption Prosecutor's Office supported draft law No. 12367-3 and called on MPs to support it in the first reading and in general, as it would make it impossible for individuals to avoid responsibility due to formal deadlines, even in cases where they have been notified of suspicion (NABU, SAP, 2025).

This draft law proposes, in particular, to exclude the expiration of the pre-trial investigation periods specified in Article 219 of the CPC of Ukraine after a person has been served with a notice of suspicion as a ground for closing criminal proceedings. Instead, it is proposed to provide that in case of expiration of the pre-trial investigation and failure of the prosecutor to perform the actions provided for in clauses 1, 2 of part 2 of Article 283 of the CPC of Ukraine, or failure to open the pre-trial investigation materials, the defense, the victim or other person whose rights or legitimate interests are restricted during the pre-trial investigation, has the right to file a motion to oblige the prosecutor to resolve the issue of termination of the pre-trial investigation. If the motion is granted, the investigating judge shall issue a ruling obliging the prosecutor to resolve the issue of termination of the pre-trial investigation. At the same time, it is also envisaged that a ruling on satisfaction of the motion to oblige the prosecutor to decide on the termination of the pre-trial investigation cannot be issued if, on the day of consideration of the relevant motion by the investigating judge, the pre-trial investigation materials were opened by the prosecutor or investigator on his/her behalf in accordance with the procedure provided for in Article 290 of the CPC of Ukraine. At the same time, it is proposed to grant prosecutors the authority to extend the pre-trial investigation. It is also proposed that a prosecutor may be brought to disciplinary liability in disciplinary proceedings on the grounds of non-performance or improper performance of official duties, including failure to make a procedural decision or failure to perform a procedural action within the time limits provided by law, etc. (Draft Law No. 12367-3, 2025).

At the same time, the Federation of Employers of Ukraine, the Association of Entrepreneurs – ATO Veterans, the Union of Ukrainian Entrepreneurs, Diia. City United, Manifesto 42, Coalition of Business Communities for the Modernization of Ukraine, Ukrainian League of Industrialists and Entrepreneurs, International Business Community Board, and the Ukrainian Chamber of Commerce and Industry are deeply concerned about the draft law No. 12367, as well as alternative drafts No. 12367-1, No. 12367-1, No. 12367-2, No. 12367-3, as the proposed amendments pose risks of violating the principle of presumption of innocence, the principle of adversarial proceedings, and placing the burden of proof on the defense, which significantly affects the business environment of Ukraine. At the same time, the business community believes that the changes introduce even greater uncertainty in criminal proceedings, lead to paralysis and blocking of its economic and commercial activities due to investigative actions and delays. At the same time, due to the possibility of abuse, law enforcement officers will send indictments to courts, and nothing can be done at the stage of preparatory proceedings, as is currently provided, and the defense will have to go through the entire trial procedure (Prasad, 2025).

To evaluate the proposed changes, the reasonableness of the time limits should be analyzed first, which is one of the general principles of criminal proceedings that the content and form of criminal proceedings must meet (Articles 7, 28 of the CPC of Ukraine) (CPC, 2012).

Reasonableness of time implies that everyone has the right to have the charges against him/her either brought to trial or to have the relevant criminal proceedings against him/her closed as soon as possible (Article 28 of the CPC of Ukraine) (CPC, 2012).

This general principle of criminal proceedings is in line with the provisions of Article 6 of the Convention for the Protection of Human Rights and Fundamental Freedoms of 1950, which guarantees everyone the right to a fair and public hearing within a reasonable time by an independent and impartial tribunal established by law, which shall decide in a civil case the rights and obligations of the person concerned or determine the validity of any criminal charge against him (Convention, 1950).

At the same time, the European Court of Human Rights in its case-law on reasonable time limits in criminal proceedings proceeds, in particular, from the following

– the right to a trial within a reasonable time is based on the need to ensure that the accused do not have to remain in a state of uncertainty about the outcome of the criminal charges against them for too long (paragraph 68 of the judgment in *Kart v. Turkey*, application no. 8917/05) (*Kart v. Turkey*, 2009)



– the clear purpose of the relevant provision of paragraph 1 of Article 6 of the Convention in criminal cases is to ensure that accused persons do not remain under indictment for too long and that the charges are determined (paragraph 18 of the judgment in *Wemhoff v. Germany*, application no. 2122/64) (*Wemhoff v. Germany*, 1968).

Thus, in view of the above, the existing mechanism for closing criminal proceedings on the grounds of expiration of the pre-trial investigation period encourages the prosecution to conduct pre-trial investigation within a reasonable time, which is fully consistent with the objectives of criminal proceedings, in line with the provisions of international treaties, the case law of the European Court of Human Rights and in line with the general principles of criminal proceedings.

Violation of the pre-trial investigation deadlines set by the CPC of Ukraine cannot be considered a formality, as it indicates compliance with due process.

According to the Supreme Court, in the theoretical aspect, “due process of law” is a form of administration of justice, which is formed by a set of procedural human rights guarantees aimed at achieving procedural justice. The guarantees that together form due process include the right to judicial protection, the right to an effective investigation, and the right to a speedy trial. The application of due process is one of the constituent elements of the rule of law principle and provides, among other things, that the powers of public authorities are defined by the provisions of law and requires that officials have permission to act and continue to act within the scope of their authority. Application of due process of law in criminal proceedings is a method of implementing the rules of criminal procedure established by the criminal procedural law, which ensures the achievement of the goals of legal regulation of criminal procedural relations in the field of pre-trial investigation and trial. Due process of law applies both during court proceedings and at the pre-trial investigation stage. Failure to comply with due process entails a violation of the right to a fair trial guaranteed to everyone by Article 6 of the Convention (Supreme Court Decision, 2021).

In addition, the exclusion of the expiration of the pre-trial investigation after serving a person with a notice of suspicion as a ground for closing criminal proceedings and the introduction of the possibility for the investigating judge to oblige the prosecutor to make a decision on the issue of closing the pre-trial investigation not only does not comply with the general principle of reasonableness of terms, but also narrows the judicial control at the pre-trial investigation stage, and therefore cannot be considered an effective way to protect the rights of the parties to the decision. Since the prosecutor's power to close criminal proceedings is discretionary, no effective means of influence is provided in case of deliberate inaction of the prosecutor.

The introduction of disciplinary liability of the prosecutor can in fact in no way serve as an effective mechanism for restoring the violated rights of participants in criminal proceedings as a result of failure to comply with the mandatory pre-trial investigation deadlines.

Scholar and lawyer Yevhen Pelikhos believes that the Government, represented by the Ministry of Justice, as the developer of this draft law, has chosen an erroneous strategy to improve the results of the pre-trial investigation: according to the explanatory note, to achieve this goal, it is necessary to eliminate the shortcomings of the legislation. Unfortunately, the Government considers clause 10 of part 1 of Article 284 of the CPC to be such a shortcoming. However, it would be much more effective to direct efforts not to exclude from the legislation undesirable for the prosecution provisions on the consequences of the expiration of the investigation period, but to ensure that the prosecution complies with this period. At the same time, the author draws attention to the fact that it is proposed not to extend the effect of the innovations only to those proceedings that will be closed before they come into force, but the legislator, supplementing in 2017 Part 1 of Article 284 of the CPC with paragraph 10, provided that the amendments apply to cases in which information about a criminal offense was entered into the URPTI after the entry into force of these amendments. However, when the Government wants to roll back, it does not propose to apply these amendments only to cases in



which information about a criminal offense was entered into the URPTI after the amendments came into force (Pelikhos, 2025).

Lawyer D. Ponomarenko notes that the terms of pre-trial investigation, their completion and extension are a key element of criminal proceedings, as they ensure a balance between the speed of the pre-trial investigation, and ultimately justice and the rights of the suspect. At the same time, the exclusion of clause 10 of Article 284 of the CPC looks unreasonable and unfounded. At the same time, these draft laws do not solve the practical problems of the issue of the pre-trial investigation timeframe in criminal proceedings where no person has been served with a notice of suspicion and their control by investigating judges in terms of compliance with the principle set out in Article 28 of the CPC – there is no real, unitary mechanism for implementation (Ponomarenko, 2025).

Thus, a systematic analysis of the criminal procedure legislation, the position of lawyers and the public shows that the exclusion of the expiration of the pre-trial investigation after a person has been notified of suspicion as a ground for closing criminal proceedings is supported only by law enforcement agencies, as it will simplify their activities and offset the legal consequences of violating the pre-trial investigation deadlines. At the same time, the proposed mechanism cannot be considered effective and is in no way able to strike a balance between the efficiency of the pre-trial investigation and the rights of the suspect, including the fact that the charges against him/her will either be subject to trial or the relevant criminal proceedings against him/her will be closed as soon as possible.

Given the results of this study, it is important to further study in depth the pre-trial investigation period and the legal consequences of its violation, taking into account the provisions of both national criminal procedure legislation and international treaties, in order to find the best way to bring Ukrainian legislation in line with international standards.

**Conclusions.** The existing mechanism of closing criminal proceedings on the grounds of expiration of the pre-trial investigation period encourages the prosecution to conduct pre-trial investigation within a reasonable time, which is fully consistent with the objectives of criminal proceedings, the general principles of criminal proceedings, and is consistent with the provisions of international treaties and the case law of the European Court of Human Rights.

The above criticisms of the unfounded proposals of the draft law No. 12367 of 30.12.2024 and alternative draft laws No. 12367-1 of 08.01.2025, No. 12367-2 of 14.01.2025, No. 12367-3 of 14.01.2025 should be taken into account when considering legislative initiatives in the Parliament.

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## SUBSIDIARITY PRINCIPLE IN THE SPHERE OF LEGAL LIABILITY AND BEYOND (EXPERIENCE OF THE REPUBLIC OF AZERBAIJAN)

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**Abstract.** This article examines the principle of subsidiarity in the legal system of the Republic of Azerbaijan, highlighting its role in various branches of law (civil, family, administrative, criminal) to ensure fairness and efficiency. Subsidiary liability promotes the fulfilment of obligations and regulates non-obligatory legal relations. From a constitutional perspective, the study analyses the relationship between subsidiarity, proportionality and the unity of the State, emphasising its adaptation from private to public law. The research confirms its importance in decentralisation, governance and legal order. The results show that subsidiarity strengthens political stability, public trust and the protection of human rights, while contributing to sustainable development. The constitutional interpretation of the principle varies according to the international obligations assumed by the state.

**Key words:** legal system of Azerbaijan, legal responsibility, constitutional law, public administration, decentralization, proportionality principle.

**Introduction.** The principle of subsidiarity is a general legal principle, which is most often used when it comes to different levels of public authority. Its content consists in the fact that if the authorities (subjects) closest to the person (problem) cannot cope with the task at all or cannot do it effectively (for example, to ensure the protection of a right, to provide an administrative service), then the solution of this task can be transferred to the authorities (subjects) less close to the person (problem), which have the necessary resources or powers to solve the task.

Subsidiarity as a principle of law in a number of branches of law creates the basis for the existence of subsidiary liability. In the system of law of the Republic of Azerbaijan the following approach is traditional: in case of inability to fulfil obligations or solve a problem by the main subject of a legal relation, legal responsibility may be imposed on another person. This ensures more flexible and effective problem solving, as well as faster fulfilment of obligations. Thus, in a legal relationship there is a so-called ‘distribution of responsibility’. In other words, there are several subjects on whom legal responsibility of a subsidiary nature can be imposed.

Thus, the principle of subsidiarity and subsidiary liability contribute to the balance between such values of law as efficiency and justice.

The principle of subsidiarity plays a crucial role in ensuring the effective distribution of powers and responsibilities within the legal system of the Republic of Azerbaijan (RA). By allowing higher authorities or subjects to intervene only when lower ones are unable to fulfil their duties, subsidiarity promotes a balanced and efficient approach to governance and legal liability. This is particularly relevant in the context of subsidiary liability, where additional subjects can be held accountable if the primary subject of the legal relationship fails to fulfil its obligations. Such a mechanism helps to maintain social order, prevent legal gaps and improve the protection of rights and interests.

In the legal framework of RA, subsidiary liability is reflected in various branches of law, including civil, administrative and criminal law. For example, in commercial law, subsidiary liability may be applied to shareholders of a company or related legal entities if the primary debtor is unable to meet its financial obligations. Similarly, in administrative law, state authorities may assume responsibility



for providing public services when local institutions are unable to provide them effectively. These examples illustrate how the principle of subsidiarity functions as a dynamic legal tool that enhances both legal certainty and social justice by ensuring that responsibilities are allocated in a rational and fair manner.

**Research objectives.** The objectives of this study are formulated in accordance with the research topic. The aim and objectives are interrelated and aim to comprehensively study the principle of subsidiarity in the field of legal liability in Azerbaijan. The study aims to:

- analyse the theoretical foundations of the principle of subsidiarity in law;
- examine the application of subsidiary liability in different areas of Azerbaijani law;
- identify the benefits and challenges associated with the implementation of subsidiarity in legal liability and beyond (on the materials of the constitutional law).

**Materials and Methods.** The research methodology is structured to ensure the reproducibility of the study. The study uses a combination of general scientific and specialised legal research methods. These include the comparative legal method for analysing subsidiarity principles in different branches of law, the doctrinal method for studying theoretical aspects, and the legislative study method for examining practical applications in Azerbaijani law. Where appropriate, references are made to widely recognised legal methodologies.

**Research findings and discussion (main text).** The research findings and their discussion provide an in-depth analysis of the principle of subsidiarity in legal liability in the Azerbaijani legal system. The findings show how subsidiarity contributes to legal certainty, the equitable distribution of responsibilities and the protection of individual rights (in constitutional law). The discussion also identifies potential challenges and suggests ways to optimise the application of subsidiary liability in Azerbaijan.

Efficiency as a principle of law 'manifests itself first in the formation of the motive of lawful behaviour, and then in the lawful behaviour itself' (Lopatka, 2019: 27). Law 'aims' first at consciousness, at the formation of the motive of lawful behaviour, and then at behaviour. Thus, the effectiveness of law lies not only in its ability to form stable legal beliefs (which in turn contribute to the establishment and maintenance of law and order), but also in its ability to stimulate compliance with legal norms through internal motivation. The law thus becomes not only a regulator of external behaviour, but also an instrument for the formation of a legal consciousness that ensures long-term compliance with established norms.

The essence of justice as a legal principle lies in the existence of "truth, which is linked unconsciously to legality and therefore to law". Justice therefore acts as the main criterion for assessing both legality and law enforcement, ensuring their moral and social acceptability. It aims to strike a balance between the interests of the individual, society and the state, and serves as the basis for building trust in the legal system.

Balancing these two principles (i.e. the principle of fairness and the principle of efficiency) with the application of the third principle – the principle of subsidiarity – makes it possible to avoid unnecessary intervention of state authorities (e.g. if a debtor fails to fulfil a loan obligation and the loan was concluded with the participation of a guarantor – instead of applying to the court, the creditor applies to the guarantor for payment of the debt).

Thus, the connection between the principle of subsidiarity and the principle of subsidiary liability is that both are aimed at creating a flexible system of distribution of rights and duties (powers), as well as legal liability, which allows solving problems at different levels of legal regulation as efficiently and fairly as possible.

Subsidiary liability in the branches of legislation of the Azerbaijan Republic, where it is provided for, is applied only in case of impossibility or inefficiency of application of "main" legal liability. Subsidiary liability is applied in various branches of law, including civil, family, administrative

and criminal law. The application of the principle of subsidiarity to legal liability makes it possible to ensure a fair distribution of this liability, using different levels of legal effect depending on the situation.

#### 1. Subsidiary liability in civil law.

In the civil law of the RA, the principle of subsidiary liability is expressed in situations where the "primary" defendant is unable to fulfil its obligations and liability is imposed on "secondary" participants.

For example, Article 442 of the Civil Code of the Republic of Azerbaijan provides for the liability of guarantors for obligations. It stipulates that the guarantor is liable for the debtor's obligations if the latter has not fulfilled its obligations to the creditor (Civil Code, 1999). Thus, the guarantor is vicariously liable only if the debtor himself is unable or unwilling to pay the debt. Pursuant to Article 383 of the Civil Code of the RA, if several persons are obliged to perform an obligation and one of them fails to do so, the other debtors are vicariously liable for the performance of that obligation (Civil Code, 1999). Thus, the subsidiary liability of the guarantor serves as an additional guarantee for the creditor, allowing him to obtain performance of the obligation in the event of the insolvency or refusal of the debtor. This contributes to the strengthening of confidence in civil law relations in general and to the protection of the parties' interests in contractual obligations in particular.

#### 2. Subsidiary liability in family law.

In the family law of the Republic of Azerbaijan, subsidiary liability is most often manifested in matters relating to maintenance obligations.

Thus, article 82 of the Family Code of AR stipulates that if the primary obligor (e.g. a parent) is unable or does not fulfil his or her obligations, subsidiary responsibility shall be assumed by other relatives, such as grandparents or other close relatives (Family Code, 1999). This may be the case if the person liable for maintenance is unable to pay. This mechanism aims to protect the interests of the child by ensuring that the child's material needs are met even if the primary maintenance provider fails to meet his or her obligations. It also emphasises the principle of family solidarity enshrined in family law, where the duty of care for children is shared between several generations of relatives. The principle of family solidarity is thus combined with the principle of subsidiarity (Family Code, 1999).

#### 3. Subsidiary liability in administrative law.

In the administrative law of the AR, subsidiary liability is often encountered in situations related to bringing legal entities and their managers to responsibility.

For example, according to Article 87 of the Code of Administrative Offences of the AR, subsidiary liability may be imposed on the heads of organisations or legal entities, if the organisations themselves cannot incur administrative liability due to lack of financial or organisational resources (On administrative violations, 2000). For example, if a legal entity cannot fulfil the obligation to pay a fine, its head may be held subsidiary liable.

Such a measure aims to prevent abuse by legal entities and their managers by ensuring that obligations to the state are fulfilled. It also highlights the personal responsibility of managers for the actions or omissions of the organisation, especially in cases where their decisions directly lead to administrative offences.

#### 4. Subsidiary liability in criminal law of the AR.

In criminal law, subsidiary liability can refer to the responsibility of third parties for the acts of offenders when they cannot be punished themselves, for example, because of their age or state of health. Thus, in the criminal law of the AR, subsidiary liability may be applied to the parents or legal representatives of a minor if the minor has committed a crime but cannot be punished due to his or her age. In such cases, the parents or legal guardians may be held liable if they have failed to fulfil their duties of education or supervision.



Article 44 of the Criminal Code of the Azerbaijan Republic stipulates that adults may also be held liable for the actions of minors if they have unduly influenced minors or failed to fulfil their duties of proper upbringing (Criminal Code, 1999). Such measures are aimed at ensuring the proper upbringing of minors and preventing recidivism. This also underlines the importance of the responsibility of adults to create conditions conducive to the lawful behaviour of children and adolescents.

#### 5. Subsidiary liability in the tax law of the AR.

Subsidiary liability in the AR can also be applied in the sphere of taxation, when responsibility for non-payment of taxes is imposed on the management of a legal entity, if the organisation (enterprise, institution) itself cannot be held liable. Thus, in accordance with Article 60 of the Tax Code of the RA, if a legal entity evades payment of taxes, liability may be imposed on its officials (e.g. general director) who are vicariously liable for the actions of their company with respect to tax liabilities (Tax Code, 2000). Such measures are aimed at ensuring the proper education of minors and preventing recidivism. This also highlights the importance of the responsibility of adults to create an environment conducive to the lawful behaviour of children and adolescents.

#### 6. Principle of subsidiarity in the constitutional law of the AR.

One of the branches of law in the AR, where there is legal liability – but no subsidiary liability – is constitutional law. The status of this branch of law in the national system of law is very important, and that is why it is interesting to look at how the principle of subsidiarity is understood in this branch (to see, how it influences the constitutional liability).

In constitutional law, the principle of subsidiarity is studied more and more often. However, such studies are still few – due to the fact that for many years this principle was popular in private law sciences, with the intensification of European integration – in international law (the law of the Council of Europe and the law of the European Union). And only after that the principle of subsidiarity became more and more ‘visible’ in the science of constitutional law. Moreover, very often – and Azerbaijan is not an exception – this principle is only implied in the norms of constitutional law, in the acts of constitutional legislation – but the word combination itself (i.e. the phrase ‘principle of subsidiarity’) is not used.

It should be noted that the principle of subsidiarity occupies an important place in modern concepts of public administration (public administration, public management), local self-government (management) and, in general, in the concepts of regional policy. Its relevance in the early XXI century is conditioned by the need for effective distribution of powers between different levels of public authority, especially in the conditions of globalisation, decentralisation and democratisation of public administration. Despite the active use of this principle, it remains the subject of discussions in the doctrinal constitutional field. In Azerbaijan, issues related to the principle of subsidiarity in national constitutional law have been actively and for a long time studied by Professor Garajayev. Having started studying this principle from international legal problems (for details see (Amelicheva, Qaracayev, 2021)), he later shifted the focus of his attention to the national level (for details see (Barvinenko, Qaracayev, 2023; Qaracayev, 2023)).

In public law, the principle of subsidiarity is most often studied in public international law and constitutional (national) law. It should be noted that the impact of international obligations undertaken by states on their national legal systems makes it necessary to analyse how the principle of subsidiarity is enshrined in the relevant international instruments.

From this point of view, the study of N. Mishyna on this topic attracts attention (Mishyna, 2023: 727). The author, as the title suggests, paid special attention to the use of this principle in the sphere of human rights protection. In the Introduction to the study she noted that this is due to the fact that ‘the effective protection of rights and freedoms of an individual at the international level becomes possible only within the framework of a system built on the principles of subsidiarity: the protection of human rights should be carried out primarily at the domestic level, and international measures

should complement such protection, not replace or supplant it' (Mishyna, 2023: 729). Although in constitutional law the application of the principle of subsidiarity is not limited only to the sphere of human rights protection, it is important that the author focused attention on how this principle is applied by the judiciary.

Based on his research, the author has made a number of conclusions and findings important for the science of constitutional law.

First, she argued that 'the mechanism established by the European Convention for the Protection of Human Rights and Fundamental Freedoms, as well as other existing international mechanisms for the protection of human rights, has a subsidiary character, and a correct understanding of the nature of the norms of the Convention in the light of the concept of subsidiarity is essential for the effective functioning of the mechanism established on its basis. This applies equally to the whole system of international protection of human rights' (Mishyna, 2023: 731). This conclusion is important for the science of constitutional law.

This conclusion emphasises the fundamental role of the principle of subsidiarity in the protection of human rights. After all, it is the principle of subsidiarity that provides a balance (and also interaction in general) between national and international mechanisms of protection, recognising the priority of national bodies in resolving legal issues and seeking protection of subjective rights. At the same time, the principle of subsidiarity allows international institutions, such as the European Court of Human Rights, to intervene only in cases where national mechanisms prove incapable of ensuring the protection of subjective human and civil rights and freedoms.

For the science of constitutional law, this means that it is important to pay attention to the development and improvement of national legal instruments that comply with international standards, if the state has ratified the relevant instruments. Such an approach contributes to strengthening the democratic foundations of the state, where the protection of human rights is ensured at every level, from national to international. In addition, the concept of subsidiarity serves as an important benchmark for assessing the effectiveness of constitutional institutions and their interaction with international mechanisms.

Secondly, the author formulated that 'in the history of philosophical and legal doctrines, the principle of subsidiarity originated as a special model of building social relations, which allows distributing responsibility between different levels of a unified system in such a way as to ensure the most effective fulfilment of tasks. In this case, the main responsibility is assumed by a lower level of the system, and a higher level fulfils auxiliary, subsidiary functions (Mishyna, 2023: 732). This conclusion is of interest because it covers a wider range of issues – not only the institution of human rights, but also the institution of legal organisation of public authority.

This quote emphasises the philosophical and legal origins of the principle of subsidiarity as a model of distribution of powers between different levels of public authority. This is extremely important for constitutional law, as such a model contributes to a more efficient functioning of the state system, ensuring optimal distribution of functions between public authorities of different levels. The principle of subsidiarity strengthens the role of local self-government bodies, recognising its key responsibility for resolving issues affecting citizens locally, which, in turn, contributes to the decentralisation of public power and democratisation of public administration.

Continuing the author's logic, it should be noted that for the doctrine of constitutional law this means: the state should not only ensure the legal autonomy of local authorities, but also create mechanisms to support them at the national level. Such an approach allows building a more sustainable system of public administration (namely, that decisions are made as close as possible to citizens, and that the public authorities located 'above' perform only auxiliary functions, supporting and coordinating the activities of lower-level bodies. This is particularly relevant in the context of the protection of human and civil rights and freedoms, but not only).

Another monographic research of international legal character, in which the author pays much attention to the principle of subsidiarity, is the article of Kersbergen and Verbeek, 2004. The author's developments are important for the science of constitutional law. First of all, this statement concerns the way they emphasise: the principle of subsidiarity cannot exist by itself, in isolation from other principles of law. Using a systematic approach and the theory of international law, the authors come to the conclusion that the principle of subsidiarity is very important to be used in conjunction with the principle of proportionality. Thus, they define the correlation of the principle of subsidiarity and proportionality as their consistent application. That is, if it is recognised that the adoption of certain measures (norms) is necessary, for example, at the level of the European Community, then the principle of subsidiarity ceases to apply, and it is the turn of the principle of proportionality, which will determine what measures (actions, norms) should be taken' (Kersbergen, 2004: 144). This quote illustrates an important relationship between the principles of subsidiarity and proportionality, which is significant for the science of constitutional law.

The significance of this emphasis is important because, in the context of analysing national legal institutions, this relationship between the principles of subsidiarity and proportionality makes it possible not only to determine the level at which a particular measure (act) should be taken, but also to assess its adequacy, effectiveness and compliance with the objectives set. Thus, the principle of subsidiarity as if 'sets the direction', and the principle of proportionality acts as a 'tool' (to specify and evaluate actions or inaction).

For the science and practice of constitutional law, this is important because it helps to establish a balance in the distribution of powers between public authorities (especially central authorities) and local self-government bodies. In addition, the application of these two principles together contributes both to the prevention of excessive interference of public authorities of higher levels in the sphere of competence of other public authorities, and to the construction of a functional system of distribution of powers, which is especially important in the conditions of reforming the system of public authorities for its adaptation to modern challenges.

Thus, the importance of the study in constitutional-legal developments of how the concept of 'principle of subsidiarity' is used in international law is due to the fact that this principle is enshrined in many international legal acts. It is especially common in European documents – including the European Charter of Local Self-Government of 1985 and legal norms of the European Union. However, at the state level in constitutional-legal practice, its implementation often faces challenges related to the lack of clarity in the delimitation of powers and the absence of a systematic approach to its application. That is why constitutional-legal research in this area is extremely important.

For the Azerbaijani legal system, as well as for a number of other post-Soviet states, the study of the application of the principle of subsidiarity can be a useful reference point for the development of public law. For example, in conditions where it is necessary to adapt the system of state power to the needs of local communities and implement more flexible approaches to public administration, this principle can strengthen the interaction between the central and regional authorities, contributing to a more effective response to the needs of the population.

Moreover, the application of the principle of subsidiarity in public law opens up opportunities for strengthening the democratic foundations of state administration and local self-government. The inclusion of subsidiarity elements in legislative acts allows for greater autonomy of regions within their competence, which, in turn, contributes to the strengthening of their responsibility for the development of their respective territories.

Thus, the principle of subsidiarity can be considered not only as a tool for the distribution of competence 'vertically' and 'horizontally', but also as a conceptual basis for building a sustainable, flexible and democratic system of public administration and local self-government. The inclusion of

this principle in the practice of public administration and its theoretical development remain topical tasks for both legal science and the practice of constitutional law.

The authors propose to consider that ‘the content of the principle of subsidiarity – additionality, assistance and establishment of the lowest possible level in the implementation of public powers in meeting the needs of the population’ (Kersbergen, 2004: 146). The principle of subsidiarity, as emphasised in the above quote, is based on three key elements: additionality, assistance and establishment of the lowest possible level for the exercise of public powers. These components define the unique nature of this principle, making it an important tool in both theoretical reflection and practical application.

Complementarity implies that public authorities of a higher level ‘intervene’ only when lower level authorities are not able to cope with a particular task ‘independently’ (i.e. at their level). This allows avoiding excessive centralisation of power, preserving the possibility for local public authorities to effectively solve local problems. This approach is important for increasing the autonomy of local public authorities and strengthening their responsibility for the fulfilment of the tasks assigned to them.

The provision of assistance, being an integral part of subsidiarity, emphasises the coordination function of higher levels of government. This not only contributes to improving the implementation of powers, but also promotes the formation of partnerships between the bodies of different levels of public authorities.

The establishment of the lowest possible ‘low’ level for the exercise of powers is aimed at ensuring the direct proximity of public authorities to the population. This approach not only speeds up decision-making, but also improves their quality by taking into account local specifics and peculiarities. The application of this principle within the framework of territorial administration, especially in states with diverse economic and social conditions, makes it possible to significantly increase the efficiency of public administration (and primarily state administration).

The analysis of the content of the principle of subsidiarity is important for the science of constitutional law. Its application in public law creates opportunities for improving the system of law through the development of clearer mechanisms for the distribution of competence between public authorities, as well as responsibility. This is especially important in the context of global challenges of modern society, such as migration crises, environmental threats, etc., which require flexible and adaptive solutions.

**Conclusions.** It should be noted that subsidiary liability in the system of law of the Republic of Azerbaijan is manifested in various branches (civil, family, administrative, criminal, etc.) and serves as an important tool for ensuring compliance with the principles of fairness and efficiency in legal regulation. Subsidiary liability allows for a more flexible and effective solution to the problems of fulfilment of obligations of both contractual and non-contractual nature, and also contributes to the ordering of those legal relations that are not of an obligatory nature.

From the constitutional point of view, the article analyses the main characteristics of the principle of subsidiarity and its correlation with other, closest constitutional principles (proportionality and unity of state power). The study confirmed the relevance and significance of these principles both in doctrinal and practical context. It is stated that the principle of subsidiarity, which originally emerged in the private law sphere, is successfully adapted to public law, becoming an important tool for the distribution of powers between different levels of public authority. Its application helps to ensure more effective satisfaction of the needs of the population through decentralisation and transfer of powers to the level of public administration closest to the recipients of administrative services. It has been demonstrated that the constitutional and legal content of the principle of subsidiarity in each state depends on the international obligations assumed by the country.

The study of the principle of subsidiarity contributes not only to the development of the theory of constitutional law, but also to the strengthening of law and order, political stability and citizens'

trust in public authorities. Its successful implementation in practice is the basis for the creation of an effective system of public administration, focused on the protection of human rights and freedoms, as well as on achieving the goals of sustainable development of the state and society.

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## LEGAL SYSTEM OF THE UNITED STATES OF AMERICA: LAW CRITERIA OF TYPOLOGIZATION

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**Abstract.** The article examines the legal system of the United States of America with the help of legal typologization criteria (which are the features of the institutional, functional and regulatory parts of the legal system) with the allocation of such cognitive constructs as «identification code of the legal system» and «indicator of the functioning and development of the legal system»; the author confirms its identification with the Anglo-American type (the legal system of the United States of America is a subtype of common law); reveals the state of its functioning, as well as trends and prospects for its solution. The tasks which made it possible to achieve the research objective were as follows: analysis of scientific sources, official documents, including sources of law; creation of an empirical basis for the application of such cognitive constructs as «identification code of the legal system» and «indicator of the functioning and development of the legal system»; identification of typical indicators, indicators of permissible deviations, and development prospects. These constructs made it possible to identify deformations and formulate ways to overcome them. In the course of the study, the author used sociological methodology, in particular, the method of document analysis. Thus, a significant number of official documents were analyzed: laws and other sources of law of the United States of America; scientific sources; and an empirical basis for the application of general theoretical and comparative legal methodology was created. The stability of typical indicators in the legal system of the United States of America is revealed. It is also established that the indicators of permissible deviations are also aimed at ensuring this stability, and this gives rise to the conclusion that the legal system of the United States of America may evolutionarily transition to a future new legal form.

**Key words:** legal system of the United States of America, general type of legal systems; typologization and identification of legal systems; law criteria of typologization, legal system identification code; indicator of functioning and development of the legal system.

**Introduction.** The transformation of modern legal systems of the world requires not only distinguishing the types of legal systems using legal criteria, and identifying national legal systems with them, but also finding out the status of their functioning and development, interaction with interstate legal systems, identifying deformations and finding ways to prevent or overcome them. These issues can be resolved with the help of such cognitive constructs as «legal system identification code» and «indicator of the functioning and development of the legal system», as well as by applying the appropriate scientific methodology.

The object of this study is the legal system of the United States of America, which is an American subtype of common law. It was formed, as is well known, under the influence of English law, but since the beginning of 1607, there has been a need to apply not only English law, but also to regulate the new relations that have developed in North American settlements. The Declaration of Independence in 1776 and the adoption of the Constitution of the United States in 1787 (which was ratified by all states by May 1790, although it entered into force on June 21, 1788) were the formal completion of the process of formation of the United States of America and the beginning of the national legal system.

Comparative legal scholarship has long been conducting research that helps to identify law criteria and characterize national legal systems that can be identified with the general type, as well as



those that allow characterizing the American common law subtype. However, the transformation of the global legal order requires revision of doctrinal approaches and development of new knowledge regarding typologization and identification of modern legal systems of the world.

**The purpose of the article** is to study the legal system of the United States of America with the help of such cognitive constructs as: «identification code of the legal system» and «indicator of functioning and development of the legal system»; to argue that it belongs to the common law based on legal criteria; and to identify the state of its functioning and development prospects.

**Material and methods of research.** The work uses, first of all, sociological methodology, in particular, the method of document analysis. This made it possible to form an empirical basis for the general theoretical and comparative legal analysis of the modern legal system of the United States of America. Thanks to the general theoretical cognitive construct «legal system» consisting of institutional, functional and regulatory parts, the author clarifies the peculiarities of the legal system of the United States of America and its structural parts which are used as law criteria for typologizing legal systems and identifying them with the corresponding type of legal systems of the world. Such law criteria made it possible to determine the place of the legal system of the United States of America among the modern legal systems of the world using the comparative legal method and typology.

**Results and discussion.** Given the features which are common to English law, the legal literature includes the following features of modern American law: the Constitution; two-tier nature of the legal system (Federation and States); high level of structure and systematic nature of the legal system; the possibility of different systems of legislation and common law (legal precedent) in different States; a significant number of consolidated acts, as well as codified acts; less formalized precedent than in English law; combination of case law with the rapid development of sectoral legislation; exercise of constitutional control functions by higher courts of general jurisdiction (Luts, 2003: 126–127).

Important principles of the legal system of the United States of America are the principles of: federalism; separation of powers into legislative, executive, judicial; legal protection of rights and freedoms, which are enshrined in the amendments included in an important document that, although not incorporated into the Constitution, is recognized as its organic part – the Bill of Rights of 1791 (contains 10 amendments). As of today, the Constitution of the United States of America has already been amended 27 times, which were adopted in the respective periods of the legal system development from 1798 to 1992.

The United States of America is a presidential republic with a federal system. According to the Constitution of the United States of America, all legislative powers belong to the Congress, which includes the Senate and the House of Representatives, and Section 8, Article of the Constitution defines the legislative and other powers of the Parliament. The chambers of Congress are also vested with certain powers (Constitution of the United States, 1789).

As can be seen from Section 1, Article II of the Constitution, exclusive power is vested in the President of the United States, who exercises the powers of both the head of government and the head of state. The President also has lawmaking powers, such as: in his messages to Congress, he forms specific legislative proposals and bills (within the framework of the legislative initiative); signs, approves the adopted laws (or returns them to Congress); adopts bylaws (Constitution of the United States, 1789). The functions of the Presidential Administration are performed by the Executive Office, which includes: White House Office, National Security Council, Office of Science and Technology, Office of Management and Budget, etc. (each president may change the number and functionality of the departments of this apparatus).

The President is also the head of the government – the Cabinet, which consists of ministers. It should be noted that the powers of the Cabinet are not defined in the Constitution. The Cabinet and central departments are the executive apparatus under the President of the United States and prepare recommendations on issues within their competence.

The federal executive apparatus is a rather large strategic center of state governance. It consists of scientific, coordinating and advisory institutions that carry out a huge amount of work on generalizing internal and external (world) development trends; develop strategic recommendations and legislative proposals in their areas of activity, etc. The United States government system includes a number of ministries: Defense, Commerce, Education, Energy, Justice, Interior, Finance, Transportation, Foreign Affairs, etc. In addition to the ministries, other departments, agencies, and government (public) corporations are established by law. The activities of these bodies are regulated by the Administrative Procedure Act (The Administrative Procedure Act, 1946).

Outside the structure of ministries, independent administrative agencies are created, such as: Nuclear Oversight Commission, United States Agency for International Development Cooperation; Environmental Protection Agency; National Labor Relations Authority; United States Information Agency and others (USA.gov. A-Z index of U.S. government departments and agencies). They are characterized by the powers to issue bylaws; law enforcement; and dispute resolution.

The executive branch is complemented by government (public) corporations, for example: US Postal Service, Federal Deposit Insurance Corporation. It is worth emphasizing that no single agency within the executive branch oversees government corporations. Instead, each corporation is overseen by the relevant congressional committee(s) with jurisdiction over its area of operation (Pritchett, 1938: 189–200).

The judicial system of the United States of America has a two-tiered nature: federal and state courts. According to Section 1, Article III of the Constitution, the judicial Power in the United States shall be vested in the Supreme Court of the United States and in such other Inferior Courts as the Congress may establish. And Section 2, Article III of the Constitution states that the judicial power shall extend to all cases at common law and in equity, and arising under the Constitution, the laws of the United States, and the treaties made in their behalf (Constitution of the United States, 1789).

The Supreme Court of the United States has the prerogative of jurisdiction over the cases of official representatives, ambassadors, and consuls to which the United States is a party. In all other cases, the Supreme Court is the appellate court of law and fact (according to the rules established by Congress). Crimes (except impeachment) are tried by jury (Constitution of the United States, 1789).

The federal judicial system has three main levels: district courts (trial courts), courts of appeals (which are the first level of appeal), and the United States Supreme Court, the final level of appeal in the federal system. In total, there are 94 district courts, 13 circuit courts, and the United States Supreme Court. There are also special courts, which include the Tax Court, customs, bankruptcy, intellectual property, etc.

It is worth emphasizing that the US Constitution obliges all states to maintain a «republican form» of government, although the three-branch structure is not mandatory (Constitution of the United States, 1789). Each state has its own legislative body that is authorized to pass laws. The formal name of such bodies varies from state to state: in twenty-five states it is called the Legislature; in nineteen states it is called the General Assembly; in Massachusetts and New Hampshire it is called the General Court; in North Dakota and Oregon it is called the Legislative Assembly. All states (except Nebraska) have a legislature consisting of two chambers: the upper chamber is always called the Senate, the lower chamber is usually called the House of Representatives, but in some states, it is called the Assembly or House of Delegates.

Since the Constitution of the United States of America in Section 8, Article I defines only the federal powers of the legislative body of the United States – the Congress (Constitution of the United States, 1789), then, according to Amendment 10 of the Bill of Rights, the powers not delegated to the United States by the Constitution nor prohibited to the states are reserved to the states or to the people (Bill of Rights, 1791). When delineating the powers of federal and state bodies, the sphere

of overlapping powers is identified, and such issues are resolved through constitutional prohibitions (Constitution of the United States, 1789).

The states have their own system of executive authorities, headed by governors, who have the same powers as the federal authorities, but to address local issues (although some functions are not duplicated in the states). The governor is the highest official in the state and is elected by the citizens of the state. Each state has local authorities (self-government) in accordance with the administrative-territorial division. The main types of political and administrative units are: counties, municipalities, and special administrative districts. Representative bodies are elected and/or appointed collegial bodies – councils (or committees) headed by mayors or chairmen. Legal regulation of their activities is carried out on the basis of state constitutions, acts of legislative and executive bodies, and even municipal codes (Constitution of the United States, 1789).

The state judicial system includes the Supreme Court (in some states – the Court of Appeals); courts of appeal, district courts, courts of limited jurisdiction (considering civil cases with small amounts of claims, cases of minor crimes, etc).

Within the limits of permissible deviations, it should be noted that Sections 8 and 10 of Article I of the Constitution of the United States of America contain provisions that are the criteria for a clear separation of powers between federal and state authorities (Constitution of the United States, 1789). In addition, it should be noted that the Constitution of the United States enshrines not only the principle of separation of powers, but also the principle of checks and balances. In particular, this includes the independence of the judiciary, whose highest courts are empowered to assess the constitutionality of the actions of the legislative and executive branches (both at the federal and state levels). This allows one branch of government to participate in the functioning of the other branches, such as the President's veto power over legislative decisions; the Senate's power to confirm candidates for positions in the executive branch; and the legislature's power to remove from public office (impeachment) representatives of the executive and judiciary.

The powers and structural organization of the above-mentioned state bodies and other entities are determined by laws (primarily constitutions), as well as the procedure for carrying out their respective legal activities, which are usually divided into lawmaking, law enforcement and law interpretation.

The legislative activity of the United States Congress is aimed at adopting laws.

The general procedure of legislative activity of the Congress and the chambers is regulated by the Constitution of the United States (Constitution of the United States, 1789), the Congressional Reorganization Act of 1946 and (Galloway, 1951: 41–68); the Congressional Reorganization Act of 1970 (Kravitz, 1990: 375–99) (these laws solved a wide range of procedural and institutional problems related to the activities of the US Congress), as well as customs, court precedents, and rules of the chambers. The power of the chambers to establish rules stems from Section 5, Article I of the United States Constitution, which states that each house may determine the procedural rules of its proceedings (Constitution of the United States, 1789). The Standing Rules of the Senate have been in effect since 1789 (currently, there are forty-five rules, the latest version was adopted on January 24, 2013) (Standing rules of the Senate, 2013), and the Standing Rules of the House of Representatives are adopted each time a new convocation is formed.

The legislative procedure of state legislatures is similar to that of Congress. In all states (except Nebraska), legislatures have a bicameral system. Once a bill is approved by both houses, it is sent to the Governor for signature and publication. Governors of all states (except North Carolina) have a veto power; in 39 states, governors can veto the entire bill or its individual articles (Constitution of the United States, 1789).

The activities of executive authorities are generally law enforcement activities, which result in decision-making in the form of law enforcement acts. However, they are also granted certain law-making powers, including the adoption of law enforcement regulations. The President of the United

States of America also has law-making powers to conclude international treaties (Constitution of the United States, 1789).

By-laws are created by governors or state executive authorities, local governments. However, the main activity of these bodies is law enforcement, and therefore the creation of acts of application of law. The judiciary also carries out law enforcement activities, but the Supreme Court of the United States, as already mentioned, also carries out lawmaking activities (in particular, creates precedents that are sources of common law). The Supreme Court also carries out law interpretation activities, since there are no special bodies of constitutional control (interpretation of the Constitution) in the United States of America; it also carries out law-making (control) activities regarding the compliance of laws adopted by the Congress and state legislatures, as well as acts of the executive branch with the Constitution of the United States (Supreme Court of the United States. Official website).

The state supreme courts are responsible for interpreting state constitutions and laws, as well as for constitutional review and administrative justice (Federal and State Courts: Structure and Interaction, 2023).

Within the limits of permissible deviations in the legal system of the United States of America, it is necessary to pay attention to the lack of a clear distinction between lawmaking, law enforcement and law interpretation activities, and some higher judicial bodies perform all these types of legal activities.

As I have already noted, the legal system of the United States of America, although based on English common law, has acquired a number of peculiarities in the course of development, including in terms of sources of law.

The legal literature suggests that the United States of America is characterized by two main sources of law: laws and court decisions containing common law rules. The ratio of priority of these two sources of law changes from time to time. In modern conditions, the role of laws is increasing, while the fundamental importance of the decisions of the Supreme Court of the United States is maintained. The position is also expressed regarding the division of sources of law into mandatory (normative) and non-mandatory (non-normative) (Glendon, Gordon, Osakwe, 1985). In turn, the hierarchy of mandatory sources is considered as follows: The Constitution of the United States of America; common law (defining principles that are recorded in court decisions based on law); statutory law; laws; international treaties of the United States of America; court procedural rules created by the Supreme Court of the United States; subordinate legislation (delegated legislation, subordinate legislation); court precedents; the law of justice, the law of reason; trade customs; private law agreements (contracts). Non-binding sources of law include: legal doctrine; laws of foreign countries; obiter dictum (a court's position that goes beyond the facts of the case); decisions of foreign courts; judicial practice (a set of decisions of courts of all levels that do not create precedents) (Glendon, Gordon, Osakwe, 1985).

According to the Constitution of the United States, the Constitution and the laws made or to be made by the authorities of the United States shall be the supreme Law of the Land, and the Courts in every State shall be bound by the same, whatever may be the Constitution or Laws of any State, to the Excellency of the same (Constitution of the United States, 1789).

Therefore, the fundamental source of the law of the United States of America is the Constitution of the United States of America of 1787, which consists of seven articles and 27 amendments (Constitution of the United States, 1789). It should be noted that the Constitution does not enshrine all the legal institutions that are inherent in the modern Basic Law, but these gaps are filled by court precedents, constitutional customs, acts of Congress and the President. The Constitution is supplemented by amendments, and the Supreme Court of the United States is called upon to ensure its prestige and authority, thanks to whose interpretation the Constitution is adapted to modern realities.

The statutory law of the United States is a set of federal and state laws and regulations. Each state has its own specific sources of law; however, no state law or regulation may contradict the United



States Constitution or state constitution. Eliminating the legal uncertainty of diversity is an important issue in the United States of America, which is being addressed through the adoption of unified acts.

The Supreme Court of the United States plays an important role in shaping the law. It is worth noting that court decisions in the United States, according to researchers of this problem, play a leading role, but, unlike in England, without formal adherence to precedent (Legeais, 2016).

Attention should also be paid to the peculiarities in states that were formed under the influence of Romano-Germanic law. For example, the state of Louisiana, which was formed under the influence of French and Spanish law, has a Civil Code adopted in 1808 in a bilingual version. It regulates most of the issues of private law in Louisiana, in particular: property, contractual, commercial spheres, most of the civil procedure and family law (Parise, 2014: 453); the territory of Puerto Rico is based on Spanish law, in particular the Spanish Civil Code (Código Civil, 1889).

Collective bargaining agreements and international treaties play an important role in the system of sources of law in the United States of America. According to Section 2, Article VI of the Constitution of the United States of America, treaties (along with the Constitution and laws) are the supreme laws and take precedence over state laws (Constitution of the United States, 1789).

The results of the activities of executive authorities and judicial bodies are law enforcement acts. At the same time, a number of executive bodies are authorized to create bylaws, i.e., they have lawmaking powers. In addition to law enforcement powers to hear cases and render judgments, the highest courts also have law-making powers (formulation of common law principles; creation of regulatory precedents) and law interpretation powers, which result in decisions of the Supreme Court of the United States on the interpretation of the Constitution, decisions of state supreme courts on the interpretation of state constitutions, etc.

Within the limits of permissible deviations, attention should be paid to the possibility of adjusting the Constitution of the United States, albeit under the rather complicated procedure provided for in Article V of the Constitution (Constitution of the United States, 1789).

Article VI of the Constitution of the United States, which determines the priority of the Constitution, laws and international treaties of the United States (federal law) over state laws, which must comply with federal law (Constitution of the United States, 1789), is important for ensuring a balance between federal and state sources of law. The balance in the legal system of the United States of America is also ensured by judicial precedents established by the Supreme Court of the United States and state supreme courts, which fill in legal gaps or adapt existing sources of law to modern realities. At the same time, they promote legal unification through judicial practice and provide standardized legal regulation on similar issues (both at the federal and state levels). In addition, the decisions of the Supreme Court of the United States and state supreme courts contain interpretive provisions that are also aimed at standardizing legal regulation, especially in terms of the approximation of state common law.

Important for the characterization of this subgroup of Anglo-American legal systems is the definition of the principles of interaction between national and international law. First of all, it is worth emphasizing that the United States of America belongs to the states that automatically integrate international treaties into the national legal system (Bolintineanu, 1974).

Case law (decisions of the Supreme Court of the United States) is formed as follows: it records the provision that the Constitution has supremacy over treaties concluded by the United States of America. International treaties have equal legal force with the laws of the United States of America, and in cases of conflicts between treaties and laws, the courts are guided by the principle «the last source of law in time is a reflection of the sovereign will» and the source of law that was adopted later has priority. Whether a treaty or a law, the effect of international treaties in domestic spheres can be annulled by courts on the principle of «subsequent law annuls the previous one» (Mulligan, 2023). However, courts proceed from the presumption that the legislature did not intend to cause the state to



be liable under international law for violating international treaties and try to interpret national law in such a way as to ensure its compatibility with the treaty concluded earlier. At the same time, the provision of Section 2, Article VI of the Constitution of the United States of America, according to which an international treaty is classified as a higher source of law (Constitution of the United States, 1789), indicates their priority over state laws (they are executed on a par with federal laws).

The second source of international law of the United States of America is international custom. Although its influence on domestic law is more difficult to discern, more than a century ago the United States Supreme Court noted that customary international law is part of U.S. law, despite domestic laws that conflict with customary international law (Dubinsky, 2010).

**Conclusions.** The study of the legal system of the United States of America provides grounds for a number of conclusions. First of all, it should be noted that according to identification indicators it belongs to a general type, namely: it has subjects authorized to create law (among which the highest judicial bodies are also endowed with norm-setting powers); a fairly flexible relationship between law-making, law-enforcement and law-interpreting activities; significant attention is paid to the norms of procedural law; the structure of the legal system consists of three components: statutory law, common law and the law of equity; the system of sources of law includes: regulatory legal acts, regulatory legal agreements (collective and international), judicial regulatory legal precedents; a large number of consolidated acts are used; the system of sources of law is mostly formed under the influence of international legal standards.

It is worth emphasizing that the indicator of the functioning and development of the legal system made it possible to establish that the studied legal system has typical indicators, such as: the principles, goals, tasks of the functioning of the systems are fixed in the Constitution; the institutional part is structured; the bodies of the legislative, executive, judicial and other authorities are endowed with the appropriate law-making, law-enforcement, and legal interpretation powers to carry out the relevant types of legal activities, the procedure for which and the requirements for legal acts (results of this activity) are defined in the sources of law and regulatory acts.

Regarding the indicators of permissible deviations, it is advisable to note that they are usually aimed at strengthening typical indicators, achieving the goal of the legal system: means of legal unification are distinguished, overcoming deformations (legal analogy, unification of judicial practice, corrective activities, legal interpretation acts, means of overcoming conflicts, etc.). There is a clear demarcation of powers between the competence of federal bodies and subjects of the federation. The US Constitution enshrines the principles of separation of powers, as well as the principles of checks and balances; the Supreme Court of the United States of America can decide on controversial issues between states; higher courts are empowered to assess the constitutionality of the actions of the legislative and executive branches. If there is a vague distinction between law-making, law-enforcement, and law-interpreting activities (since some higher judicial bodies perform all types of activities), this is compensated for by clear rules for the implementation of any type of legal activity, enshrining them in official documents and strictly prohibiting their violation. There is use of corrective law-making activities, in particular, regarding amendments to the Constitution. The distribution of issues regulated by federal and state laws is regulated, and in the event of conflicts, the supremacy of federal law is recognized.

It is flawed that the system of sources of law is formed on the principle of balancing and interaction, eliminating deformations: judicial precedents; creation of unified model laws. In the United States of America, autonomous implementation of international treaties is in effect. An important role in ensuring the validity of US treaties is played by courts that shape practice, namely: The Constitution has supremacy over US treaties, and they have the same legal force as the law. There has been no record of inconsistency of sources of law with real social conditions; the use of legal means that do not allow achieving the goal of the legal system; violation of structural organization; replace-

ment of legal means with other social means, as well as no indicators or trends in the development of a progressive state.

Thus, it is possible to state the stability and balance of the legal system of the United States of America due to the action of typical indicators and indicators of permissible deviations.

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## FUTURE PROPERTY DONATION CONTRACT AS AN INHERITANCE CONTRACT RECOGNITION GROUND

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**Abstract.** This article subject matter is legal relationships which arise in future property donation contract recognition as an inheritance contract situation.

Future property donation contract legal opportunity to recognize as an inheritance contract indicates the presence of three legal regimes for this legal deal – donation legal regime, future property donation legal regime and, as follows from Civil Law of the Republic of Latvia section 1926 provisions, contractual succession legal regime.

As a result of this circumstance, the essential components formed by the rules of the law of donation, which mediate active and retroactive influence on the formation of objects inherent in the inheritance contract, will undoubtedly have a different legal nature, both retroactively – on the rules of the applicable law of donation, and actively – on the rules of the law of contractual succession, applicable to the law of inheritance contract.

As a consequence, this situation will give rise to other legal consequences which are not characteristic of the legal regulation of these agreements.

It is quite difficult to assess the consequences mentioned above.

The lack of specification of the norm regarding transfer of future property legal category indicates that future property donation as a form of hereditary alienation – this deal recognition as an inheritance contract should provide legal and sufficiently approved grounds for invalidity.

However, carrying out law-making activities, Latvian legislator allowed the transfer of future property as the legal basis for future property donation contract as a form of property hereditary alienation.

**Key words:** applicable law, contractual succession, future property donation agreement, future property donation contract content, inheritance contract, inheritance contract content.

**Introduction.** Recognition of the future property donation contract as a contract of inheritance indicates the presence of three legal law grounds in this legal deal – donation law, donation of future property law and, as follows from Civil Law section 1926 provisions, contractual inheritance law.

As a result of this circumstance, the essential components formed by the norms of the law of donation, mediating the active and retroactive impact on the formation of objects inherent in the inheritance contract, will undoubtedly have a different legal nature, both retroactively – on the norms of the applicable law of donation, and actively – on the norms of the law of contractual inheritance applicable to the law of the inheritance contract.

As a consequence, this situation will give rise to other legal consequences that are not inherent in the legal regulation of these agreements.

It is quite difficult to assess the consequences mentioned above.

As a result of this circumstance, the hereditary consequences of a contract of gift of future property in the context of the right of contractual inheritance are expressly prohibited in the German Civil Code – paragraph 310 of this normative act determines that *a contract by which one of the parties undertakes to transfer all or part of his future property or to encumber it with usufruct is void.*

The lack of specification of the norm in terms of the legal category of *transfer of future property* indicates that the donation of future property as a form of hereditary alienation is prohibited.

However, in carrying out law-making activities, the legislator of the Republic of Latvia has permitted the transfer of future property as a legal basis for a contract of gift of future property as a form of hereditary alienation of property.

However, the conditions under which a balance of legal categories and norms is ensured, implementing the interaction of the essential components of the future property donation contract for the purpose of being consistent and in accordance with legislative practice, as well as the principles enshrined in Civil Law of the Republic of Latvia (further – Civil Law) section 1 norms for the purpose of recognizing this contract as an inheritance contract, have not been created.

There is no doubt that the legal consequences inherent in a secondary deal – an inheritance contract – may lead to the invalidity of the primary legal deal – future property donation contract on the grounds of defective content.

The defect of content in this case is established by Civil Law sections 648 and 1927 provisions in relation to Civil Law section 383 provisions.

Civil Law section 1926 provisions states that *a gift of future property, or a joint gift of present and future property, shall be considered an inheritance contract, provided that the present property is not delivered immediately.*

This formulation of the future property donation contract gives rise to a whole series of questions regarding the subjective, substantive and objective composition of the norms of the competent law of the contract of donation in terms of the norms defined by the legal category of *future property*, which can and should be recognized as the forming norms of the contract of inheritance in terms of the norms established by the legal categories of *future property – future inheritance*.

This wording indicates the need to apply the mandatory rules of the inheritance contract to the future property donation contract.

However, Civil Law does not provide an answer to the moment of the beginning of the application of the rules of the inheritance contract – the answer is definitely given that future property donation contract can be recognized as an inheritance contract.

Due to the existence of a legal category, this formulation of the norm of Civil Law section 1926 *shall be considered*, by virtue of Civil Law section 4 provisions, dictates the need to establish the content of the norms, provided by Civil Law section 1926 in relation to Civil Law section 639 norms in order to comply with legal goals defined by Civil Law section 6 provisions.

This provision is essential for compliance with the general provisions of the rules of the law of obligations in their promotion of the establishment of a balance between the rules of the law of the future property donation contract in relation to the rules of the law of the contract of inheritance.

The current position of legal regulation in determining the probability of recognition does not predict or establish the necessary balance of the norms of the law of a contract of gift of future property as a primary legal deal in relation to the right of an inheritance contract as a legal deal of a derivative nature.

It is necessary to develop applicable legal regulation for a consistent act of recognition of a contract of gift of future property as a contract of inheritance, in accordance with the provisions of the Civil Law.

The structure of the applicable legal regulation, necessary for a consistent act of recognizing a contract of gift of future property as a contract of inheritance, must correspond to a scheme, the essential constituent elements and norms of which fit into the system of categories of *legal relations in accordance with the essential constituent parts of a contract of gift, regarding future property that is not subject to inheritance – legal relations in accordance with the essential constituent parts of a contract of gift regarding future property subject to inheritance.*

In this situation, the conditions for applying Civil Law section 389 norms in terms of applying *priority of inheritance under a contract* conflict factor become unclear.

Recognition of the future property donation contract as a contract of inheritance establishes the supremacy of the norms of the future property donation contract as the legal basis for the emergence of essential components of the contract of inheritance relative to the norms of the contract of inheritance recognized as concluded later.



Accordingly, the amount of property and the value of the inheritance shares due to heirs by law and other legal instruments providing for inheritance are changed retroactively.

The legal nature and consequences of the priority applied retroactively to a contract of gift of future property in terms of the rules of priority to a recognized inheritance contract concluded later also become unclear.

**Legal relationship formation issues.** It is possible that a conflict of collisions may arise in relation to the norms that determine the priority of norms in the situation of a recognized concluded inheritance contract.

This situation leads to the need for the legislator to adopt norms that determine the factors of mutual priority of the primary instrument of contractual inheritance – the future property donation contract and the instrument that is recognized by virtue of the essential components of the secondary instrument – the inheritance contract.

The instrument that helps to clarify the norms of mutual priority, as well as other norms that help to establish the content of legal relations arising in the context of a the future property donation contract and an inheritance contract, is the status of rights and obligations.

The status of rights and obligations is a legal category, the basis of which is the norms of a dynamic, situational nature.

In the situation of recognition of the inheritance contract as concluded, the status of rights and obligations includes the primary status of rights and obligations and the status of rights and obligations of a derivative nature.

**Primary status of obligations** is a set of norms that arose between the parties as a result of concluding a contract for the donation of future property – *authors' note*.

**Derivative status of obligations** is a set of norms that determine the set of obligations that have arisen between the parties to a recognized concluded inheritance contract – *authors' note*.

The fundamental category, which is the basis of the primary and derivative status of rights and obligations, is the imperative norms, stated by the term *permissible complexity of the essential components* of the norms mentioned above.

The legal category of *the status of rights and obligations* in relation to the object composition of the future property donation contract in relation to the norms determined by the legal category of *future inheritance* is defined as the subject of the general nature of the object of contractual inheritance

This legal category consists of the definition and interpretation of objects of the norms of the law of obligations, created and formed by virtue of the norms of inheritance and the law of obligations by persons who are parties to a specific legal relationship that exists and develops within the framework of contractual inheritance.

The emergence of this type of objects is carried out through the use of rights and the fulfillment of obligations that are abstract in nature due to the unstable legal form determined by the norms of the conflict factor within the framework of the essential components of the legal transaction, determined by legal categories *a contract for the donation of future property – a contract of inheritance imperatives*.

In order to give stability and basis (casuality) to the norms formed by the norms essential for determining the correct content of the legal categories *of the future property donation contract – the contract of inheritance* and their compliance with the essential components of the legal category of *the permissible complexity of the essential components*, the choice of law is important.

Without a doubt, the subject of legal regulation of the mentioned above legal concepts will include a certain part of the inheritance legal order.

The norms of the obligatory legal order will also be included.

Undoubtedly, the legal systems of the mentioned above legal regimes will be included in the legal regulation.



This feature gives rise to certain difficulties in the qualification of the subject defined by the norms of the legal category of *permissible complexity of essential components* in relation to the status of rights and obligations determined by legal category of *a contract of gift of future property – a contract of inheritance* norms.

The right of contractual inheritance, determined by the general clause *future inheritance* in relation to the norms of the conflict factor *contract of gift of future property – contract of inheritance*, undoubtedly has an abstract legal nature due to substantive conflicts that have an interpersonal legal nature.

Due to this circumstance, the essential generic feature inherent in the status of rights and obligations, both under the inheritance contract and under the future property donation contract, is inheritance, which is complicated by the norms of the general clause *inter vivos* and *inter vivos – mortis causa*, as well as their combinations, are established by the norms of both inheritance and obligation law.

Based on this, the abstract nature of the norms of this type of status of rights and obligations requires legal confirmation in accordance with Civil Law sections 1673 and 1674.

In situation of application of German substantive law norms – the norms of the German Civil Code paragraph 431.

The legal confirmation of these norms is necessary for the purpose of recognizing them as obligations that are essential components of the status of rights and obligations that are essential for the future property donation contract and inheritance contracts.

In this case, the future property donation contract and the contract of inheritance are recognized as concluded and entered into force in accordance with Civil Law section 646 provisions, taking into account Civil Law section 1533 provisions.

This legal statement is also necessary for the purpose of determining the essential components of the rules that ensure the indivisibility of the subject of performance as the basis for establishing a joint and several obligations.

The establishment of a joint and several obligations must be made in relation to objects that are essential for establishing the rules of the conflict factor *achieving a complete agreement regarding the future inheritance*.

This legal statement must be established by a unified conflict binding, specialized discretely future property donation contract and contract of inheritance legal regulation.

The specialization of this conflict binding must be achieved through the diversification of the conflict factors of the above mentioned Civil Law norms.

The effect of the conflict factor – *reaching a complete agreement* regarding the norms of the status of rights and obligations – presupposes the existence of the corresponding competent law.

**Conflict factor:** substantive law hypothesis norm that forms and determines the binding and scope of a conflict norm.

**Conflict factor definition in certain (procedural) cases:** the process of emergence and termination of a conflict norm in relation to the legal force of a substantive law norm. This process is provided by initial, final, and definitive norms. Within the framework of this process of emergence and termination of the mentioned conflict norms, their imperative legal categories carry out the formation and determination of the legal basis for the scope of a conflict norm – *authors' note*.

To determine this right, the Civil Law, by virtue of the provisions of section 4, must use the provisions of the norm established by the provisions of sections 418, 640, 646 in relation to the norms determined by *future inheritance* conflict factor imperatives.

However, by virtue of Civil Law section 6 provisions, this basis may be recognized as conflicting and, as a consequence, invalid due to a defect in the content.

Due to the conflicting grounds defined by Civil Law sections' 418, 640 and 646 provisions in regard to Civil Law provisions established by Civil Law section 1533 for conflict factor *future inheritance* imperatives.

In this case, the conflict of laws rule may determine the competent law to be the law corresponding to Civil Law section 1912.

In this situation, Civil Law section 1926 provisions will be excluded from the norm defining the conflict factor *future property* as an object of contractual inheritance corresponding to the conflict factor *future inheritance*.

The exception described above does not comply with the provisions of the above mentioned imperative norms, established by the legal category of *permissible complexity of essential components* in terms of essential components of norms determined by conflict factors *future property – future inheritance*.

In order to form a consistent legal basis that complies with Civil Law section 4 provisions and complies with the norms of *the permissible complexity of essential components* legal category.

This procedure is fundamental.

For the purposes of determining the competent legal regulation in the case of the corresponding right to recognize a contract of gift of future property as a contract of inheritance and determining both the primary and derivative status of rights and obligations.

The above mentioned norm, together with this category, must determine the law of which sphere of legal regulation should be applied to this private law relationship in the situation of legal norms that determine the legal interpretation *according to the direct meaning of the law and in accordance with the system of laws*.

The complication of the inheritance right of recognition in accordance with Civil Law section 606 provisions by another element determined by Civil Law section 1533 provisions introduces a split in legal regulation in the matter of determining and applying the rules corresponding to the rules of interpretation fixed *in the direct meaning of the law and in accordance with the system of laws* categories.

For the purposes of determining the primary and derivative status of rights and obligations, the resolution of the above dilemma is of fundamental importance.

The conflict factor *is the achievement of a complete agreement* in accordance with the purposes of the inheritance law applied to the rules that form the essential components of both the future property donation contract and the recognized concluded inheritance contract.

In this application of the conflict factor rule *reaching a full agreement* norms persons' actions must comply not only with Civil Law chapters' „*Opening of Succession, Protection of Estates, and Inheritance Actions*”, „*Accepting and Taking an Inheritance*”, „*Mutual Relationships Between Co-heirs and Division of the Inheritance*” provisions, as well as with Civil Law chapter „*Termination and Loss of Inheritance Rights*” provisions, but also with Civil Law chapter „*Gifts*” provisions.

The above match does not currently exist.

In turn, the conflict factor *of reaching a complete agreement* regarding the status of rights and obligations within the framework of legal regulation of the future property donation contract – *a contract of inheritance* categories in accordance with the inherent legal nature by virtue of the rules according to the system of laws interpretation must comply with Civil Law chapter „*Contractual inheritance*” provisions.

Also, the above mentioned conflict factor must comply with Civil Law general and special provisions of „*Obligations Law*” chapter.

Legal regulation regarding the validity of established and terminated norms that constitute the primary status of rights and obligations must be developed and normatively enshrined.

Legal regulation regarding the validity of formed and terminated norms that constitute the derivative status of rights and obligations must be developed and normatively enshrined.

Legal doctrine calls this legal regulation *legal norms validity statute* (Bermann 1988:779).

While emphasizing the applicability of the statute of validity in relation to a recognized inheritance contract based on the mandatory provisions of the contract of gift of future property, it seems appro-

appropriate to focus attention on the question of whether it would be correct in principle to recognize this legal deal as an inheritance contract.

Undoubtedly, the complex nature of the validity of recognition due to the circumstances listed below, which indicate differences in the concepts of legal error, which are essential for a the future property donation contract and, separately, a contract of inheritance.

As a general rule, a mistake entails the recognition of this legal deal as invalid if it was of significant importance. A mistake regarding the nature of this legal deal or the identity or such qualities of its subject matter that significantly reduce the possibility of its use for its intended purpose is of significant importance.

Minor errors and insignificant discrepancies between the desired and actual consequences arising from this legal deal cannot serve as grounds for recognizing this deal as invalid.

A material error must concern the main elements of the transaction: the nature of the rights and obligations arising and terminating, the quantity and quality of the subject of the transaction, the type and other grounds.

An error is also considered significant if the consequences of the error cannot be eliminated at all, or if their elimination involves significant costs for the erring party.

The text of the Civil Law contains a phrase that clearly indicates the possibility of a significant error on the part of the parties to a contract for the donation of future property in relation to the imperative norms of *a contract for the donation of future property, recognized as an inheritance contract* conflict factor.

This phrase is expressed in *circumstances of the matter* category.

The difficulty arises from the fact that the rule introducing this legal category establishes the law applicable to reciprocal wills, prescribed by Civil Law section 605 provisions.

As a result of this circumstance, legislator must introduce a condition that would allow the application of this rule to the recognition of a contract of gift of future property as a contract of inheritance.

In order to create legal conditions for the interpretation of the legal category of *the circumstances of the matter* in relation to the future property donation contract as a primary legal deal in relation to the inheritance contract, section 605 should be introduced into the Civil Law, establishing legal effect of the *circumstances of the matter* category in following wording:

*if party – the donor – the future testator or the donee – the future heir – have fully or partially fulfilled their obligations under the future property donation contract, then in interpreting the term “circumstances of the matter”, rules are used which harmonize donation law norms with inheritance contract appropriate law norms.*

Undoubtedly, *circumstances of the matter* legal category without proper interpretation introduces a significant misconception of the nature of this deal or the identity or such qualities of its subject that significantly reduce the possibility of its use for its intended purpose – to unify the rules that form the legal basis of the future property donation contract in relation to the future inheritance contract.

Without proper interpretation, unification of essential components in relation to the norms of the future property donation contract and the recognized concluded contract of inheritance is not achieved – the content of the future property donation contract recognition as a contract of inheritance should not exist as a correct object of legal regulation.

Since the future property donation contract was introduced by the legislator with a general character by the clause of contractual inheritance, the norms of this clause must contain legal categories that are fundamental for the formation of conflict rules, ensuring the unification of essential components in relation to the norms of the future property donation contract and the recognized concluded contract of inheritance.

This deficiency can be compensated for by introducing a conflict factor, enshrined in the legal category of *various forms and agreements within the framework of existing and recognized concluded inheritance contracts and other contractual inheritance transactions.*

This conflict factor should be used as a unifying balance of the status of rights and obligations, an instrument that ensures a fair, competent legal regulation, emergence of both common and individual objects of the inheritance mass

The norms of this conflict factor should be used as a unifying balance of the status of rights and obligations instrument in the situation of receiving an inheritance by authorized subjects in accordance with the norms of the conflict factor *opened inheritance* (Civil Law, section 655), as well as the conflict factor *future inheritance*, established by Civil Law norms, prescribed by sections 463 and 646 provisions in relation to Civil Law norms prescribed by section 1926.

Civil Law section 463 as the basis of *the content of the will* conflict factor, abstracting the object composition of the inheritance mass, by applying the provision that *the will must express the true will of the testator* for the purposes of the emergence of the norms of the most significant connection in relation to the norms of *the content of the will – the content of the contract* conflict factor must also be subject to objectification.

In relation to the present moment, *a circumstance of the case* legal category introduces into the system of norms of the status of rights and obligations the legal possibility of giving a private character to the norms regulating the legal regime of material error.

Thus, recognition of a contract of gift of future property as a contract of inheritance will be impossible due to the impossibility of applying the rules of a contract of gift of future property to a contract of inheritance.

The private nature of the norms in this case is objectified in the legal possibility of giving legal force to the norms on a material error in relation to either a future property donation contract or a contract of inheritance recognized on the basis of future property donation contract. Private nature of the norms mentioned above does not correspond with legal regulation Civil Law, prescribed by sections 4 and 6 legal regimes.

This provision is unacceptable from the point of view of the complex nature of this legal deal and, undoubtedly, the initial status of rights and obligations that existed in relation to the joint will, as well as the derivative status of rights and obligations, the norms of which are formed from the norms of the initial status of rights and obligations.

Thus, this legal phenomenon – private nature of the rules on material error – does not provide a proper interpretation of the rules of the status of rights and obligations within the framework, prescribed by *various forms of inheritance contracts* conflict factor' norms in relation to the rules, prescribed by conflict factor' *the present property of the testators – the future property of the testators* norms.

The private nature of these norms cannot be used to create a balance of objects of the inheritance mass within the framework of the norms, prescribed by conflict factor' *present inheritance – future inheritance* provisions.

The private nature of the norms, essential for the process of recognizing a contract of gift of future property as a contract of inheritance, manifests itself as a problematic situation also in relation to the subjective, objective and substantive aspects of the norms of the law of recognition as an independent legal category, constituting the status of rights and obligations.

An example of this statement is a conflict factor *the content of the future property donation contract – the content of the inheritance contract* essentials.

Civil Law provisions, ordered by section 1926, together with Civil Law provisions of sections 1428 and 1440, as the basis for *the content of the future property donation contract* conflict factor imperatives, constituting the content of this contract, distinguish two fundamental provisions:

1). the object composition of the inheritance mass is abstracted as a legal consequence of recognizing the future property donation contract as a contract of inheritance

2). the presumption is established that *the future property donation contract must express the true will of the testator*.



Civil Law section 639 norms, denoting inheritance contract content, abstracting its content, establish law on future inheritance private provisions, which is essential only for these agreement Civil Law section 639 essentials, not provides content for inheritance contract, as a legal consequence of the future property donation contract.

Undoubtedly, this state of legal regulation does not contribute to the emergence of unified norms establishing the legal regime for the content of a contract for the donation of future property as a primary legal deal in relation to a potentially recognized concluded contract of inheritance.

The private nature of the norms *the content of the future property donation contract – the content of the contract of inheritance* conflict factor should both generate and, at the appropriate time, terminate both the rights and obligations determined by the legal norms of contractual inheritance in a situation of instability of the essential components of the future property donation contract with a contractual inheritance clause, determined by the norms of *future inheritance* conflict factor in relation to the rules of *opened inheritance* conflict factor.

This requirement is not currently met.

The situation of instability arises due to the absence of a stated moment in time when the future property donation contract will be recognized as a concluded contract of inheritance.

The norms determined by Civil Law sections 1533, 1672, 1673 provisions, which could serve as the basis for determining the moment in a concrete time period in relation to Civil Law norms prescribed by Civil Law sections 639 and 1926, should be excluded from the recognition process due to the mandatory provisions of Civil Law sections 1 and 4.

The legal basis for the exception is Civil Law section 4 provisions, which states, that *the provisions of this Law shall be interpreted firstly in accordance with their direct meaning*.

In the situation described above, the subject of the legal relationship, which is understood by the legislator under the meaning of *direct meaning* legal category in relation to the unified norms determined for the purposes of Civil Law sections 1533, 1672, 1673, denoted as unclear.

These rules should serve as the basis for determining the moment in time of recognition of the future property contract as a contract of inheritance in relation to the provisions of Civil Law sections 639 and 1926.

There is no doubt that *direct meaning* legal category in the situation of the future property donation contract should be defined as the gratuitous receipt of an inheritance by the heir under the contract of inheritance.

Currently, content of future property donation contract' content for the purposes to recognize this contract as an inheritance contract have a mixed legal nature.

The mixed legal nature in the situation serves as a potential conflict of norms, which secure the will and wills' expression in *the expression of will of the donor – the future testator and the donee – the future heir, determined in the future property donation contract – the expression of will of the heir and the testator, appointed in future recognized concluded contract of inheritance* conflict factor norms.

At the moment of drawing up a future property donation contract by authorized persons, both donor – the future testator, and donee – the future heir assume a conflict status, determined by complex legal concept *the subject of inheritance law – the subject of the inheritance legal relationship* provisions.

This circumstance undoubtedly affects both the norms that constitute the primary status of rights and obligations, and the norms of the status of rights and obligations of a derivative nature.

In this case, the assertion about the need to move away from private norms by creating norms that have a general legal nature is justified.

It seems that it is these norms that will contribute to the balance of legal categories and conflicting factors that make up the system of norms of primary and derivative legal status.



The above provision does not meet the criteria of the most significant connection established by Civil Law sections 1672 and 1673 provisions in relation to the requirements of complex norms formed on the basis of these articles.

It also does not meet the criteria of the most significant connection with Civil Law section 639 – the rules prescribed by conflict factor *the content of the contract of donation of a future thing – the content of the contract of inheritance* have a mixed and simultaneously, unstable legal nature.

At the same time, the volume of the conflict link does not provide the value equivalent required for the comprehensive and fair satisfaction of the requirements of Civil Law section 872 in terms of the rules of the conflict factor *special value* provisions.

The legal category *the special value of a thing in connection with the personal relationship of the owner* rules in the context of the above is understood as the desire of the heir and the testator in a situation of awareness of the legal necessity in which the future property donation contract will be recognized as a contract of inheritance.

The legal category *the special value of a thing in connection with the personal relationship of the owner* requirements should contribute to the creation of a legal relationship that meets the imperative norms of the conflict factor *the presence of a complete agreement* statements regarding the lifetime execution of the norms that constitute essential components of the future property donation contract, recognizing them as essential components of the inheritance contract.

In this process, in relation to the individual legal status of persons determined by legal categories *the former donee is the current heir* and *the former donor is the current testator*, legislator must take measures to overcome the essential components of the above mentioned conflict status, determined in relation to the effect of the norms of gift rights and the norms of the law of the inheritance contract in relation to the norms established by the complex legal concept of *the subject of inheritance law – the subject of the inheritance legal relationship*.

These measures should also be taken to establish the norms of the most significant connection with the goals of establishing a balance between the norms of the law of donation of future property as a special case of contractual inheritance and the norms of the law of the inheritance contract.

The norms of the most significant connection must consolidate the objectification of the essential components of the conflict factor *the special value of the thing in connection with the personal relationship of the owner* in relation to the norms of the conflict factor *the content of the will – the content of the inheritance contract*, thereby facilitating the inheritance *de lege ferenda* of both unrelated persons and spouses.

In the case of this form of inheritance, the status of spouses as subjects forming the object base, both of the contract of gift of future property, and of the inheritance contract recognized on its basis, according to Civil Law section 114, third subsection provisions should be complicated by the norms that constitute essential components of the marriage contract *mortis cause*.

Otherwise, the complication occurs due to the essential components of the marriage contract, which are determined by Civil Law section 114, first subsection provisions.

The norms of objectification must comply with Civil Law sections 639 and 640 provisions.

Objectification must be carried out with the aim of the emergence and proper interpretation of the norms formed by Civil Law section 640 provisions in terms of the imperatives of the legal category *personal obligations – inheritance rights* in relation to Civil Law section 646 provisions in terms of the imperatives of *future call to inherit* legal category.

Objectification as a way of clarifying legal reality should facilitate taking into account the due circumstances that determine the choice of applicable legal regulation in relation to existing legal relations arising in the context of *the future property donation contract – the contract of inheritance* essential norms, existing as legal relations determined before the opening of the inheritance, as well as to continuing legal relations that arise as a result of the opening of the inheritance.

The objectification of essential components of legal relations arising and existing in complex of legal categories *future property donation contract – the contract of inheritance* imperatives should be understood as the normative consolidation of:

- 1). parties' individual legal status for future property donation contract;
- 2). parties' individual legal status of the parties for inheritance contract;
- 3). parties' corresponding legal status, which includes legal imperatives that constitute the volume of legal concepts of the individual legal status of the parties to future property donation contract, corresponding with the legal imperatives of the parties' individual legal status for the inheritance contract ;
- 4). in the provisions on the content of a legal deal, arising from the legal norms established above, determined by the rules of the law of future property donation contract;
- 5). in the provisions on the content of the recognized concluded inheritance contract arising from the legal norms established above.

Also, private and complex norms, which determine the rules of the content of the inheritance contract in relation to the rights of subjects to inherited property, obligations in regard to third parties, should be subjected for objectification.

The norms that ensure the lawful merging and delimitation of rights and obligations arising from a contract of gift of future property with the rights and obligations arising from an inheritance contract as an essential component of the inheritance contract must be objectified.

In the process of recognizing a the future property donation contract as a concluded contract of inheritance, there is a possible violation of the principle of proportionality and proportionality in the process of qualifying legal categories in the system of objects formed and terminated by essential components of the norms of the primary and derivative status of obligations.

There is a formation of objects of singular and universal legal succession that do not correspond to the principles and norms of the law of contractual inheritance in the system of *transactio sunt servanda – pacta sunt servanda* principles.

There is competition between objects of singular and universal succession.

There is no immutability of the object of legal succession, which is established as a consequence of the legal activity of a person in the process of exercising rights and fulfilling obligations within the framework of the dispositions of the norms mediating the conflict relationship provided by conflict factors *inter vivos – mortis causa* material and procedural norms.

The absence of a unified concept of a thing in the Civil Law (Balodis, K. Ievads civiltiesībās.: Rīga, 2007) and, accordingly, property, creates practical difficulties for statement of the problem of defining and applying legal norms establishing legal status of property, as the content of an inheritance contract in relation to legal norms establishing legal status of property, as the future property donation contract' content' objectification.

The reason for the difficulties is that the actual situations – the emergence and dynamics of development of obligatory legal relations within the framework of legal regulation of the norms of conflict factor *the future property donation contract – the contract of inheritance*.

This issue is complicated by *inter vivos* and *inter vivos – mortis causa* general clause norms, which forms essential hereditary legal relationship within the framework of legal regulation of the future property donation contract.

This legal regulation is in turn complicated by the norms *inter vivos* general clause.

Due to the fact that the norms of this clause include generic characteristics inherent to contractual inheritance essentials, both in accordance with the essential components of the future property donation contract, which constitute the inheritance contract essential compounds.

**Conclusions.** Donation contract concluded in accordance within Civil Law section 1926 provisions as an institution of contractual inheritance is a legal form which characterized by an unstable legal nature.

This section provisions calls a number of practical problems.

These problems are recognized as:

1) Comprehensive but non-unified competent legal regulation in relation to the norms of inheritance law and the law of obligations in terms of the norms determining the actual composition of future property as the actual basis of future inheritance. The above mentioned form of competent legal regulation, depending on the actual composition, is currently enshrined in the terminology identical to the norms of inheritance law and the law of obligations. With this form, the transformation of a contract for the donation of future property into a contract of inheritance is possible. However, consequences of this transformation acknowledged as unclear.

2) It should be noted that at present, competent legal regulation, depending on the actual composition of objects of property rights in norms *future property – future inheritance* complex of two mentioned above institutions, can transform the essential components of these institutes.

Also should be transformed – unilateral, mutual and corresponding rights and obligations, into rights and obligations that are essential not for the inheritance contract as a consequence of recognizing the future property donation contract. This transformation should be constituted into a non-unified, mechanically formed legal form. As a result this transformation should be uncorresponding to legal regulation of contractual inheritance as an inheritance contract basis.

Undoubtedly, this transformation will not appropriately change the fundamental legal categories essential for the future property donation contract legal regulation in regard to inheritance contract, which include the rules that determine appropriate status for inheritance rights and, accordingly, appropriate status for inheritance obligations.

3) This transformation will change the categories that are fundamental to the legal regulation of the gift agreement as a general legal fact, including the rules which determine the status of rights and obligations, the activity and retroactivity of the rules of both the right of gift and the right of contractual inheritance.

4) The categories transformed in this way, defining in identical but non-standardized terminology the essential components of both a gift agreement and an inheritance contract in the absence of normative regulation – the right to recognition as a specific legal regime – will undoubtedly lead to the formation of substantive conflicts.

5) Questions undoubtedly arise when determining the competent law to ensure the recognition process. The recognition process as a legal regime of an independent nature also causes substantive conflicts between the rules governing the right of inheritance under a gift agreement as a possible essential part of an inheritance contract and the rules governing inheritance under an inheritance contract. The reason for this phenomenon is the detipization of conflict factors. The detipization of conflict factors is the resulting confusion of material rules as a result of a substantive conflict without the legal basis required for a legal result.

6) In the situation of possible recognition of a gift agreement as a concluded inheritance contract, the detipization of conflicting factors will cause a conflict of qualifications. And in the situation of application of identical, but not unified legal categories related to the norms of contractual inheritance under a gift agreement of future property in terms of the norms of the conflicting factor *present property – future property* imperatives and the norms of inheritance under an inheritance contract within the framework of the norms of the conflicting factor specified above.

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## THEORY AND INSTITUTIONS OF EDUCATION

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### PECULIARITIES OF THE EDUCATIONAL PROCESS FOR THE FORMATION OF STUDENTS' COMMUNICATIVE COMPETENCE IN LEARNING ENGLISH FOR PROFESSIONAL PURPOSES

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**Abstract.** The issue of developing students' communicative competence in the study of English is highlighted by the requirements for professional training outcomes in higher education institutions and current societal demands. It is summarised that communicative competence is developed through direct interaction and becomes the result of communication experience for individuals. Communicative competence is viewed as the ability to understand and produce English at the phonological, lexico-grammatical, and cultural knowledge and language skills level and in accordance with the goals and specifics of professional communication situations. Purposeful work towards developing students' communicative competence during the study of English for professional purposes is understood as a holistic process of structuring the educational process based on the alignment of its key components: goal-setting (reflecting the aim of the study and the requirement for the simultaneous participation of all students in completing specific tasks); content (based on the selection of specialised learning tasks); technological (defining the conditions, methods, and tools for the development



of communicative competence); and evaluative-resultative (designing tools to determine the effectiveness of the proposed changes and their impact on the state of communicative competence among higher education students).

**Key words:** peculiarities, educational process, students, communicative competence, English for professional purposes.

**Introduction.** The expansion of international contacts is transforming the conditions of professional activities for specialists in any field (Byram, Gribkova & Starkey, 2002: 17). An important challenge in higher professional education is developing students' ability to conduct professional dialogues with foreign partners while adhering to cultural and business etiquette norms. This is driven by significant societal changes, including integration into the global information space, the creation of a unified European educational area, and the realising of the need for mutual understanding and cooperation with professionals from various countries, including those in Europe. The growing demand for intercultural professional communication and the need to ensure national security has led to new approaches and directions in the education system to effectively prepare professionals. English has become the primary language of international communication (Breus, 2017: 264). Therefore, higher education content must be structured to ensure that students acquire a broad thesaurus relevant to their professional fields, enabling them to establish working contacts during professional activities.

The transition of higher education to new state standards requires higher education institutions to improve the training of competent specialists in their professional domains and communication (Shestopalova, 2021: 186). Therefore, the formation of students' communicative competence is increasingly significant. When considering this phenomenon in the context of its development during the study of professionally oriented English, it is appropriate to define it as a personal construct that includes structural and functional components related to an individual's cognitive processes, the specifics of their development, the acquisition of both specific and general cultural knowledge, and communicative skills. It also encompasses the formation of motivation for communicative self-improvement within professional communication, wherein the communicative activity becomes a value. This includes an interest in self-analysis of communicative activities in English, self-exploration, self-awareness, understanding professional situations, and appropriately perceiving conversation partners; effective information exchange in line with relevant norms and communication behaviour patterns; and the ability to interact with representatives of other nations.

From this definition, it is evident that developing students' communicative competence while studying English for professional purposes must be based on the planning and modelling of the educational process in higher education institutions. This necessity arises from the complexity of the phenomenon being studied and the diversity of the contemporary professional communication thesaurus (Savignon, 1997, 18).

**Main part.** Today, the mission of higher education extends far beyond the mere transmission of knowledge. Higher education institutions are "called upon to prepare citizens capable of independent thinking and seeing cultural differences as an opportunity for meaningful dialogue" (Hryshkova, 2015: 56). The goal of higher education is to nurture professionals capable of performing in business environments, achieving professional growth, and maintaining mobility in the context of an information-driven society and the development of advanced, knowledge-intensive technologies, all while possessing strong communicative competence.

The importance of English for professional purposes for highly educated professionals hardly needs justification, particularly in an era of international contacts. Foreign languages have become key production factors in economic globalisation and the close intertwining of information flows. They have become universal tools for professional and industrial life, without which it is impossible to function effectively. In academic literature, mastering a foreign language is viewed as a means

of self-actualisation and the development of creativity and the ability to make independent decisions concerning life, work, and relationships, thus forming an active personal stance (Kriukova & Pavlovych, 2019: 55).

It is essential to analyse situations, goals, and conditions to construct linguistic expressions in English within professional communication. When addressing an interlocutor, the communicator must consider factors such as age, social status, and the formality of the conversation. These linguistic operations foster the development of communicative competence. In pedagogical literature, communicative competence is regarded as a criterion for readiness for successful professional activity in all its functions: informational (as a means of obtaining and conveying information), interactive (as a culture of interaction), and perceptive (aimed at understanding the internal world of the interlocutor).

The outcome of language learning is the acquisition by students of practical skills in speaking, writing, listening comprehension, and reading, as well as the ability to apply these skills to express their thoughts and comprehend the content of texts received aurally or visually. In other words, the ultimate goal of learning a foreign language is the development of communicative competence. Teaching people to communicate is challenging and complicated because communication is not merely verbal. Its effectiveness depends on many factors: language proficiency, communication conditions and culture, etiquette rules, knowledge of non-verbal communication, and deep background knowledge, among others.

An analysis of the experience of teaching foreign languages in domestic and foreign higher education institutions and the author's practical experience has led to the conclusion that teaching English for professional purposes is predominantly focused on accumulating knowledge, explicitly enriching vocabulary and practising grammar. Undoubtedly, lexical and grammatical skills are essential for mastering a professional foreign language; however, instruction based solely on rote learning does not foster students' creative activity nor contribute to developing their communicative competence. With this approach, motivation levels are low, as students fail to see how their acquired knowledge can be applied in their future professional activities (Mirzaei & Forouzandeh, 2013: 300). A typical practical session follows this structure: checking homework, explaining new grammatical material, introducing and reinforcing vocabulary, and assigning homework. Such lessons do not promote free-flowing language communication or improve students' communicative competence.

Foreign language teaching is currently experiencing, like other areas of social life, a complex and challenging period of restructuring, re-evaluating values, and reviewing goals, tasks, methods, and materials. The primary goal of foreign language teaching is to learn the language as an actual and full-fledged means of communication. With the expansion of international cooperation in the economic and political globalisation framework, employers' demands on university graduates have changed significantly. In addition to a high level of professional expertise, modern graduates must possess a sufficiently high level of ability to establish professional contacts through specialised English to facilitate their future professional activities.

In the long term, developing communicative competence in English language communication promotes professional growth by considering both domestic and international achievements, facilitating experience exchange with foreign colleagues, and supporting scientific research, among other activities. However, observations of students' communication in higher education institutions during English lessons on professional topics show that future specialists often experience specific communication difficulties. These difficulties manifest in low self-assessment of their communicative potential, an inability to adequately evaluate their communicative "self," difficulties initiating and maintaining conversations, articulating their positions, and adjusting their behaviour in communication situations. These issues are often related to communicative literacy.

Moreover, during foreign language classes, students exhibit difficulties linked to situational anxiety, which is partly due to an insufficient baseline level of proficiency in English for professional pur-

poses. The practical importance of communicative competence for specialists of any profile, where subject-subject interaction is crucial, cannot be overstated.

The radical changes in our country's social life and its integration into the global community have made the English language a practical means of various types of communication. In higher education, foreign language instruction aims to form communicative competence in everyday and professional communication spheres.

In recent years, professional communication contexts have become considerably more complex. New components of the educational content have been identified, requiring the mastery of new professional "roles," such as that of a joint venture organiser, a distributor for a foreign company, or a manager skilled in conducting negotiations and entering into contracts with representatives of other cultural and linguistic communities.

An analysis of existing approaches to structuring the studied process has shown that one of the main reasons for the inefficiency of students' communicative activities is the underdeveloped strategy, methods, organisational forms, and overall system of communicative preparation of students when learning English for professional purposes. One key issue is the disregard for the multifunctional nature of communicative competence as a personal phenomenon, encompassing the following competences:

- professional language and speech competence, which implies mastering basic professional terminology and the etiquette of business communication, as well as the ability to produce and interpret statements relevant to the professional field;
- the intercultural aspect of professional language competence, which requires knowledge and skills related to reflecting value orientations in language and speech in both English and Ukrainian cultures, as well as the ability to use speech acts that appropriately reflect the value orientations of the studied cultures;
- logical-informational competence, which entails the ability to analyse and extract significant professional foreign-language information structure coherent statements while considering cause-and-effect relationships, style, and the genre of professional texts;
- the intercultural aspect of logical-informational competence, which involves the ability to identify socio-cultural aspects of information, analyse and internalise universal cultural values reflected in the information, and structure typical professional communication patterns that accurately reflect culturally appropriate language behaviour;
- socio-psychological competence in intercultural communication includes overcoming adverse ethnocentric reactions associated with attributions such as uncertainty and anxiety and positively accepting different worldviews as the basis for cultural variations in behaviour.

This article substantiates the author's perspective on the peculiarities of the educational process aimed at forming students' communicative competence when learning English for professional purposes. To achieve this goal, the following tasks were generated:

- analysis of current practices in forming communicative competence among students during the study of English for professional purposes in higher education institutions;
- identification of potentially effective factors that can intensify the learning process and positively influence students' communicative competence when studying English for professional purposes;
- presentation of the substantive content of the process of forming communicative competence in students learning English for professional purposes;
- description of methods and forms of educational activities for students that should be applied during the study of English for professional purposes to ensure the development of communicative competence.

**Materials and methods.** The achievement of the aim and objectives of the article was based on the use of the modelling method, the essence of which in the didactics of linguistic training is

reflected in creating conditions in the educational process that replicate the field of professional communication. The research methods used also included analysis, generalisation, and synthesis, which were applied to identify factors whose implementation ensures the achievement of the aim. These factors included development of specific personal qualities in students (such as orientation towards humanistic communication, an equal and friendly position towards the communication partner) and professional communicative qualities (such as an adequate assessment of the situation and the interlocutor, the relevance of the speech act to the communication partner, the demonstration of appropriate communicative activity); implementation of a context-situational approach to learning English; use of communicative exercises that simulate actual conditions of professional communication and contribute to the formation of communicative skills within the field of professional communication.

The practical implementation of the proposed conditions involved updating the content of students' professional training concerning the formation of communicative competence when studying English for professional purposes. The substantive aspect of the educational process involved the justification of the selection and systematisation of educational content according to the following parameters:

- compliance with current regulatory programme documents, particularly the standards of higher professional education;
- realisation of integrative and socio-cultural approaches at the level of educational content;
- reference to the provisions of competence-based and student-centred approaches. For example, the integrative component at the professional foreign-language training content level is implemented through interdisciplinary connections with the fundamental foundations of speciality-related disciplines, selecting typical situations relevant to professional business communication, and combining the course content with the content of future professional activities.

The socio-cultural component at the professional foreign-language training content level is realised by selecting information, including cultural realities, phenomena, and elements. The identification, activation, and assimilation of such elements aim to consistently form and simultaneously develop all components of communicative competence and prepare students to participate in intercultural professional communication while adhering to cultural and business etiquette norms.

Targeted work on developing students' communicative competence during their study of English for professional purposes was understood as a holistic process of modelling the educational process based on the alignment of its key components: objective (reflecting the article's aim and simultaneously requiring the participation of all students in completing specific tasks); content-based (based on the selection of tasks that promote the successful development of communicative competence); technological (defining the conditions, methods, and tools for the formation of communicative competence); evaluative-resultative (constructing tools to assess the effectiveness of the proposed changes and their impact on the development of students' communicative competence).

**Results and discussion.** Communicative competence is formed in the context of direct interaction and, as a result, becomes a product of communication experience for individuals. Communicative competence should be considered a person's ability to comprehend and produce the English language at the phonological, lexical-grammatical, and cultural knowledge and language skills by the goals and specifics of the professional communication situation. Therefore, for linguistic communication, it is not enough to merely know the language system at all levels or to follow the rules for constructing sentences according to grammatical norms; it is also necessary to influence the interlocutor and make speech statements in line with this during communication.

Thus, alongside interdisciplinary connections, special attention in the educational process should be paid to the cultural content of professionally oriented information (the principle of didactic cultural relevance). This ensures that students understand and accept cultural norms in business and socio-cultural communication. The cultural content of professionally oriented foreign language material includes specific aspects. At the lexical level, attention is focused on lexical variations whose



meanings are influenced by the cultural context of a particular field of activity and the economy in the English-speaking world. When studying English for professional purposes, students at the phrase and sentence level must apply language etiquette and consider variations in language etiquette units to express different communicative intentions based on social factors. This involves the selection of a significant amount of culturally related information that allows for:

- introducing students to new categories, such as attributions, stereotypes, generalisations, cultural universals, and empathy;
- participation in simulations and role-playing activities that encourage dual perspectives on the cultural aspects of professional communication;
- discussion and resolution of misunderstandings and intercultural conflicts.

As practice demonstrates, organising student learning around communication is one of the most effective approaches to the educational process in higher education institutions when teaching English for professional purposes (Holmes & O'Neill, 2012: 707). This is because, despite some drawbacks (such as an incomplete understanding of language mechanisms formulated as rules), it enables students to move beyond the mechanical expression of thoughts in another language towards mastering the culture of the language-speaking countries and how cultural realities are represented. All this contributes to the formation of students' readiness for professional communication as a specific behavioural strategy that includes professional, intellectual, emotional, motivational, and creative aspects of the individual. The viewpoint that the practical readiness of a higher education graduate for professional communication in English involves both conscious and subconscious attitudes (Huang, 2022: 248), models of probable behaviour, determining optimal methods of activity (Matsuo, 2012), and an assessment of one's capabilities about future challenges and the need to achieve specific results in their profession is well-founded.

Professional communication refers to a category of activity that primarily characterises interpersonal behaviour. The ability to initiate a dialogue and plan its potential directions determines the level of success in a specialist's professional activity. It can be confidently assumed that successful communication is only possible if individuals possess communicative strategies, making productive communication the foundation for fostering business cooperation. However, a new issue arises—the compatibility or incompatibility of applying specific strategies in different business cultures, which is directly related to the manifestation of communicative tolerance within professional cooperation. Communicative tolerance, as one of the key characteristics of linguistic personality interaction, reflects the level of acceptable or unacceptable behavioural norms in relationships between communication partners. As an informative component of a linguistic personality, communicative tolerance reveals important characteristics such as upbringing, communication experience, values, temperament, cultural attitudes, cognitive processes, and behavioural norms (Kukhta, 2018).

Particular attention in higher education institutions when studying English for professional purposes should be given to implementing professional and socio-cultural components (developing skills in reading, summarising, and annotating texts related to the field of study and cultural studies, delivering monologues and engaging in dialogues in the professional communication sphere). Thus, students must read authentic English literature on socio-cultural topics to acquire information for further professional application; summarise and annotate scientific literature in their field of study; participate in professional communication in English; and be familiar with the structure of document management in the country of the studied language.

When organising the learning process to develop students' communicative competence, teachers should consider the following factors when preparing lessons in English for professional purposes:

- training in the concise translation of the content of a read or listened-to text in English, as well as the composition of annotations and summary reports, should be carried out through the performance of a series of unique exercises;



- phonetics and grammar should not be presented as a set of rules to be memorised but as language material through which students develop language skills and abilities;
- mastery of lexical material takes place through working with textbook texts, educational manuals, socio-humanitarian, and original professional literature;
- reading texts at all levels of learning should be authentic, structurally complete, and contextually cohesive, varying in length and language richness at different stages of learning. The average volume of classroom reading should be 200–300 pages. Notably, along with independent reading (200–300 pages), the total volume of text material for all study years should amount to 450–600 pages;
- the phonetic minimum includes the correct articulation of sounds, adherence to all punctuation marks during reading through pauses of varying lengths, and the use of three primary tones (falling, rising, and fall-rise) (Tarnopolskyi & Dehtiarova, 2011: 243);
- the lexical minimum consists of 2,500 lexical units (Module 1 – 800 lexical units considering the school minimum; Module 2 – 1,200; Modules 3 and 4 – 500). The lexical composition includes common, socio-humanitarian, and general scientific vocabulary;
- the grammatical minimum includes standard grammar as well as grammatical phenomena characteristic of the language of science and those grammatical aspects that present particular difficulties in language acquisition (Salashchenko, 2019: 78);
- in achieving practical learning goals, general educational, cognitive, and socio-cultural objectives are also realised. Learning English as a cultural and social phenomenon should contribute to students' overall cultural development and deepen their general linguistic knowledge. Therefore, it is recommended to use socio-humanitarian literature that constitutes 40% of the total text material (Panashenko & Akopian, 2010: 32).

Thus, the formation of communicative competence in students will enable them to draft instructions based on professional texts, summarise the provided professional and business materials, understand the document structure of the countries whose language they are studying, format documents in a stylistically appropriate manner, conduct professional telephone conversations on specified topics, engage in professional correspondence, deliver monologues of a professional nature, and possess elements of oral translation during business interactions, meetings, and conferences.

A practical method for enriching a professional foreign language thesaurus is the exploratory reading of texts from various styles and genres, focusing on the analysis and perception of the following intercultural aspects:

- norms and values of business cultures (in the context of comparative analysis) (Celce-Murcia, 2017: 42);
- manners and methods of conducting business contacts, international standards of business etiquette (Schnabel, 2015: 39);
- the structure and meaning of speech acts (requests or offers of assistance, complaints, apologies);
- communication methods (conversation order, elaboration of details, patience towards a lack of information).

Through such active engagement, students master linguistic and behavioural strategies for resolving business issues in English within different business cultures. To achieve this objective (communicative learning), it is advisable to base the learning process on interactive formats (business and role-playing games, "round table" discussions, presentations, and solving communication tasks), which encourage the use of new information technologies and create learning scenarios (simulated situations) that mirror future professional business communication. Together, these activities enable students to develop their lines of communicative behaviour according to their abilities and understanding of specific situations.

A productive idea for developing communicative competence in learning English for professional purposes in higher education institutions is dialogic problem-based learning, which is characterised

in academic literature as effective. Indeed, dialogic problem-based learning most fully conveys the essence of the collaborative process between lecturers and students, highlighting their mutual activity within "subject-subject" relations (Iakovleva, 2003: 6). However, within modern higher education, it is not enough to create conditions for subject-subject communication; it is also crucial to teach students how to perform complex quasi-professional tasks (where features of both educational and future professional activities are organically combined) (Shestopalova, 2021). This can be achieved through active learning methods such as case studies, role-playing and business games, group discussions, and justifying one's point of view (expressing one's position on a particular situation or issue concerning a company or entrepreneur).

A distinctive feature of this active communication training is that it occurs in situations that closely resemble real-life scenarios. In such cases, communicative skills, alongside the linguistic material to be acquired, become the primary goal of the educational process. In addition, students gain practical skills in applying professional knowledge, creating a multidimensional situation as close to real life as possible.

Practice shows that this approach to learning fosters skills related to managing and adjusting one's behavioural styles by understanding how others may perceive their behavioural patterns and what actions provoke specific reactions (such as sympathy, antipathy, trust, and mistrust) or leave interlocutors indifferent. Mastering various behavioural strategies develops personal qualities such as sensitivity and receptivity to the mental state, attitudes, and aspirations of others. Understanding ethnocultural specifics allows students to establish effective business communication with international partners. This enhances their ability to empathise and see a situation from another person's perspective.

Acquiring behavioural strategies can be structured into specific stages of students' educational work when learning English for professional purposes. Here is an outline of these stages.

1. During the introduction to a new topic, it is necessary to determine the student's level of knowledge on the subject (this can involve questionnaires or short tests to identify the degree of basic familiarity with the material and the ability to construct language strategies on the topic).

2. The main task of acquiring language knowledge and skills is achieved by completing lexical and grammatical exercises on the given topic. The selection of exercises must include language samples to construct discussions on the topic.

3. Expanding and deepening professional skills and discussing the stated topic. Students should be encouraged to search for new or missing information and independently verify their ideas at this stage.

4. The acquisition of intercultural communication strategies should be based on fragments of professional communication in various business and management styles (in other words, "role-playing" a situation by exploring its potential development and possible solutions within the framework of Asian or American business management styles, for example). Particular attention is paid to cultural norms and rules of linguistic behaviour associated with using specific language tools.

5. Researching and discussing problematic situations. This work aims to teach students to consider a situation from different perspectives (considering intercultural differences in conducting business in different fields) and to find appropriate ways to resolve it to foster cooperation with representatives of different business cultures.

In linguistic science, it is noted that modelling everyday and professional context situations is an effective method for enriching students' communicative competence when learning English for professional purposes. This method involves educational activities where the object and the subject are united to achieve a common goal and interact collaboratively. Modelling communication situations stimulate the linguistic activity of learners.

The teaching of situational language is a complex process that combines the language system and the interaction between the teacher and students. It takes place in specially created conditions without

a linguistic environment. In English for professional purposes, it is essential to select practice-oriented material, consider the linguistic characteristics of dialogical speech, and choose the appropriate methods.

When selecting linguistic material, it is important to use language that differentiates situational language with a practical focus from other forms of language activity. Language material should be understood not just as specific grammatical, phonetic, and lexical phenomena but as language samples, formulas, and clichés characteristic of a particular situation. For example, when discussing a trip or an excursion, it is advisable to follow an algorithm: proposing a trip, choosing the idea of going on an excursion, discussing the location (where exactly to go), planning, and assigning responsibilities. In teaching English for professional purposes to develop students' communicative competence, the modelling of the following situations in the educational process is practical:

- situations of social-status relationships (discussions, conversations, dialogues with representatives from the countries of the target language);
- situations of role-based relationships (acting out informal situations, role-playing games);
- situations of cooperative activities (sharing experiences, group work, discussions).

Modelling communication situations involves artificially creating specific intercultural communication scenarios (Hoff, 2014: 509) to predict possible communication reactions and outcomes. This modelling is based on using real-life situations to reinforce behavioural patterns. In these communication situations, the conditions resemble real-life scenarios but with trial-and-error possibilities during practice. Modelling communication situations helps students build confidence in applying acquired skills in real-life situations (Shestopalova, 2021).

The following features characterise the modelling of communication situations based on role-playing interactions:

1. The participant must be mentally prepared for the role-played situation.
2. The participant must be able to adapt to the fundamental role being performed.
3. The participant must behave naturally as if everything is happening in reality.
4. The participant must respond to the situation—silence is also evaluated as a response (Camerer, 2014: 208).

Communicative learning within situational modelling is built around situations understood as systems of relationships. The main focus is not on reproducing fragments of reality using visual aids or verbal descriptions but on creating a situation as a system of student interactions. Discussions of situations based on the relationships between participants in communication make learning English for professional purposes as natural and close to actual communication conditions as possible.

By its nature, communicative learning of English for professional purposes is implemented through role plays, business games, discussions, debates, and similar activities. In communicative learning, students learn communication techniques, master speech etiquette, and acquire dialogic and group communication strategies and tactics. They also learn to solve various communicative tasks, assisting them in future professional activities.

Gaining communicative competence involves mastering the foreign language at a level that allows students to use it to meet professional needs, establish business contacts, and continue their professional self-education and self-improvement.

The social demand of the modern information society requires that, within the framework of their studies, students learning English for professional purposes develop the following skills and competences:

- adaptation to large and constantly changing information flows;
- the ability to search for necessary or missing information and apply it practically to solve specific professional tasks;

- the ability to process information competently, i.e., to find relevant facts, analyse them, and evaluate problems with alternative solutions;
- the ability to substantiate their conclusions in English competently;
- communication skills for interacting with representatives of different socio-cultural groups and socio-cultural pragmatics;
- the ability to resolve conflict situations effectively (when required);
- the ability to formulate their hypotheses and ideas for solving assigned tasks.

We believe that studying English for professional purposes effectively creates tasks that encourage students to address communicative and professional challenges. At the same time, the absence of a natural language environment negatively affects the successful completion of the aforementioned tasks, as the "artificial" language environment in the classroom can only partially address the mastery of professional and communicative skills.

Therefore, it is not surprising that teaching English for professional purposes necessitates implementing the project method. Generally, a project is an independent academic task completed over a module, semester, or course. Project-based activities meet the requirements of professionally oriented English language instruction, as they promote the development of three main qualities in students: the ability to work with various data sources and process large amounts of information in English obtained from these sources; the ability to work both in teams and independently, taking responsibility for fulfilling or failing to fulfil their obligations.

The project method is based on a significant research-related problem presented to a group of students. Each student in the group independently completes a part of the project on a professional topic, presents it for group discussion, prepares a presentation speech, and defends the project.

The effectiveness of the project method in foreign language instruction is high. Firstly, the project is an independently planned and implemented research activity in which interpersonal communication in English is organically integrated into the professional and academic context. Thus, it enables the integration of specialised subjects with the English language. Notably, professionally oriented projects are integrative by nature. To address the issues posed within the framework of project preparation, students can practically apply knowledge from related and specialised disciplines. Completing the project task allows students to realise that English is the goal of learning and a means of international professional communication.

Additionally, working on the project is a creative process (Unin & Bearing, 2016: 605). Students engage in seeking solutions to professionally relevant problems. This requires them to independently transfer knowledge, skills, and competencies to a new application context. As a result, students develop creative competence as an indicator of a high level of English proficiency. In the learning process, a situation is created in which communication in English on professional topics becomes natural and fluent, similar to communication in their native language. Evidently, in this scenario, the project participant is expected to focus not so much on the linguistic form of expression as on its content.

During the project, students demonstrate activity and creativity. While working on the project, every student, even those with a very low level of English proficiency or those who are less active psychologically, has the opportunity to express their imagination and creativity, as well as their independence and initiative. A project fundamentally changes the functional roles of the student and the teacher. The former actively selects, organises, and designs the content of English language learning and the specific lesson; the latter acts as a consultant, assistant, and participant in the sessions. Therefore, project-based work lends a student-centred and activity-based learning process, fully corresponding to the new educational goals. It creates conditions in which the process of learning English communication closely resembles the process of natural language acquisition within an authentic linguistic context.

Communicative competence also encompasses mastering non-verbal communication, such as gestures, facial expressions, postures, and spatial distance, which are additional factors in memorising



lexical and other material. Thus, the formation of foreign language communicative competence is a complex, multifaceted process closely linked to developing and forming all human mental processes and functions.

The process of forming students' communicative competence in learning professionally oriented English structurally differs from that of other academic subjects. In this case, the student's educational activities are multifunctional; in other words, the goal is not only to master professionally oriented English as a means of communication but also to simultaneously acquire professional knowledge from foreign sources and develop general informational and professional culture.

**Conclusions.** Improving the professional training system in higher education is primarily linked to the significantly changed social and individual demands in specialist preparation. Society increasingly requires professionals proficient in English for professional purposes at a level sufficient for effective professional communication.

The success of foreign language instruction in higher education institutions is currently associated with the necessity to align the teaching of English for professional purposes entirely with the needs of the national economy and the requirements for foreign language skills in various types of professional activities across different occupations. Foreign language instruction in higher education institutions is an integral component of the professional training of modern specialists in all fields and takes on a professionally oriented nature. Therefore, it is advisable to structure the educational process based on considering all its components. Its practical implementation relies on the principles of competency-based and student-centred approaches, whose postulates enable the organisation of a contextual educational environment.

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## DIGITAL STORYTELLING: DEVELOPING SPEAKING SKILLS IN LEARNING FOREIGN LANGUAGES

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**Abstract.** This study examines the role of digital storytelling in enhancing speaking skills among English as a Foreign Language (EFL) learners in higher education. The research highlights digital storytelling as an innovative pedagogical tool integrating multimedia elements to foster personalized, interactive, and practical learning experiences. Based on existing literature and a case study at the Vinnytsia Institute of Trade and Economics, the study demonstrates significant improvements in students' speaking abilities. Digital storytelling lets students personalize their learning, improve speaking skills, and develop essential soft skills. Pre- and post-test analyses confirm a marked improvement in speaking skills across multiple aspects, validating digital storytelling as an impactful educational technology. The findings underscore its potential to transform EFL classrooms, enhance students' motivation, and create collaborative and independent learning opportunities. The study concludes with recommendations for integrating digital storytelling into language teaching to achieve optimal learning outcomes.

**Key words:** digital storytelling, speaking skills, EFL learners, higher education, personalized learning, multimedia tools, interactive learning.

**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 researchers 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). The teaching of modern foreign languages is deeply connected to innovative developments in education. Advances in technology have significantly impacted teaching approaches, leading to a growing emphasis on digital resources and interactive methods in recent years (Tymoshchuk, 2022; Zamkova, Tymoshchuk, Havryliuk, 2023; Tymoshchuk, 2024).

English language learning is one of the primary language skills taught at all levels of education in Ukraine, from primary to higher education. All levels of Ukrainian education emphasize improving students' speaking skills. Being one of the four primary skills in language learning, i.e., listening, speaking, reading, and writing, speaking is considered the most difficult because it involves a complex process of representing meaning (Tymoshchuk, 2009). English language learners must not only read and understand information in a written form but also understand the content of speech and express their thoughts effectively. Speaking is an integral part of people's daily lives because it is seen as a social and situation-based activity that English language learners develop. We fully agree with Ukrainian scholars Iryna Shkola and Bohdana Saliuk that digital storytelling can be beneficial for teaching speaking because it can encourage students to explore their unique expressiveness and heighten their ability to communicate and express their thoughts and feelings (Shkola, Saliuk, 2022).

According to Stanley and Dillingham, storytelling is «the oldest form of teaching and probably the best way to learn» (Stanley, Dillingham, 2023). With the rapid technological advances, classic

storytelling has been supplemented by digital storytelling, which «contains some mixture of computer-based images, text, recorded audio narration, video clips, or music» (Stanley, Dillingham, 2023). Recently, digital storytelling has become a global phenomenon, with teachers and practitioners worldwide aiming to utilize digital stories to integrate technology into their classrooms to support lots of learning processes, significantly enhancing the speaking skills of students (Anderson, Chung, Macleroy, 2018). They believe that learners' speaking skills can be improved through digital storytelling due to its ability to facilitate and support language learning, facilitate discussions, and utilize technology to enhance the learning process with incredible speed and efficiency (Mirza, 2020).

**Analysis of recent studies and publications.** Storytelling as a teaching method has gained significant attention from researchers worldwide. Recently, educational studies have increasingly focused on integrating storytelling, including digital storytelling, into the learning and teaching processes. Foreign and Ukrainian scholars research communication skills development through digital storytelling. Several evidence-based studies confirm its effectiveness as an innovative educational technique for various academic purposes (Leshchenko, Tymchuk, Ruban, 2017; Robin, 2016; Ogawa, Tsuchiya, 2016; Benmayor, 2008; Karpenko, Ajtay-Horváth, 2021; Ruth, Greenidge, 2009). There are several studies on digital storytelling implementation in higher education for different educational purposes (Leshchenko, Tymchuk, Ruban, 2017; Robin, 2016; Ogawa, Tsuchiya, 2016; Panchenko, 2020; Benmayor, 2008; Karpenko, Ajtay-Horváth, 2021). The analyzed technology is defined as a promising education strategy and an emerging field of study in higher education in Ukraine.

**The article aims** to investigate digital storytelling as an innovative approach, particularly in teaching English to higher education students, focusing on its potential to enhance their speaking skills.

**Methods of the study.** The study employs general scientific and highly specialized methods (analysis, synthesis, comparison, generalization). The literature review summarizes the educational experience of digital storytelling in improving speaking skills.

**The findings of the study.** Personalization is a key aspect of practical education in the current digital age. Digital storytelling, with its unique ability to cater to individual learning styles and preferences, plays a crucial role in this personalized learning experience. Digitalization is a tool for improving the education system, including the philological one. Digital technologies provide several benefits, particularly the optimal use of time for more effective formation of the critical 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 (Tymoshchuk, 2024).

Digital storytelling is based on using computer tools to tell stories. According to Banaszewski, digital storytelling combines personal stories with multimedia (images, audio, and text) to produce a short movie (Banaszewski, 2005). Robin similarly defines digital storytelling as the art of telling a short story using various digital media, including images, written text, audio, and videos (Robin, 2016). These elements are combined using computer tools to tell stories that revolve around a specific theme and often include the author's point of view. Most stories vary in length and last from two to ten minutes. These short stories are saved in a format uploaded to the Internet and can be viewed on any device that can play video files. Various terms describe this method, i.e., digital documentaries, computer-based narratives, interactive storytelling, electronic memoirs, or even digital essays (Shelton, Archambault, Hale, 2017).

Digital storytelling plays the most crucial role in education among its many applications. Scholars consider it a pedagogical technology. On the one hand, digital storytelling, like any technology, involves a chain of actions aimed at creating a specific product; on the other hand, this technology can be considered a pedagogical technology because it contributes to solving practical and educational problems. Thus, digital storytelling has characteristics typical for educational pedagogical technologies, such as operability, systematicity, conceptuality, reproducibility, and controllability.

Panchenko notes that pedagogical experts who have used digital storytelling are relatively optimistic about this method. They believe it can improve the educational process by promoting group work and classroom discussion, developing problem-solving and critical thinking skills, and helping students understand complex ideas (Panchenko, 2020).

Having summarized and analyzed scientific publications (Leshchenko, Tymchuk, Ruban, 2017; Robin, 2016; Ogawa, Tsuchiya, 2016; Panchenko, 2020), we have identified several competencies, the formation of which is promoted by this pedagogical technology:

a) information competencies: the ability to use ICT tools; the ability to search for and save the most given information; the ability to create written messages and use texts as part of digital stories; the ability to create hypertext and multimedia information objects; the ability to process images and create graphic objects; the ability to record and process sounds; the ability to create musical objects; the ability to use geodata;

b) cognitive competencies: the ability to set learning tasks and solve them; the ability to think creatively and critically; the ability to organize information; the ability to learn from reading; the ability to be attentive to details;

c) communicative competencies: the ability to use oral and written communication effectively; the ability to work in a team; the ability to organize collective activity; the ability to evaluate oneself and others;

d) research competencies: the ability to collect and select data; the ability to create a project; the ability to cite sources correctly; the ability to organize references, respecting copyrights.

Personalized learning is also among the advantages of digital storytelling technology. «Digital Storytelling appeals to students with diverse learning styles and can also foster collaboration when students are able to work in groups and provides value in enhancing the student experience through personal ownership and accomplishment» (Robin, 2024). Multimodal literacy, associated with activities such as reading, visualizing, understanding, responding, generating, and interacting with digital and multimedia texts, also develops in digital storytelling. According to Walsh, processing various types of information, i.e., graphic, verbal, acoustic, and kinetic, within a digital story is simultaneous, interrelated, and synchronized (Walsh, 2010).

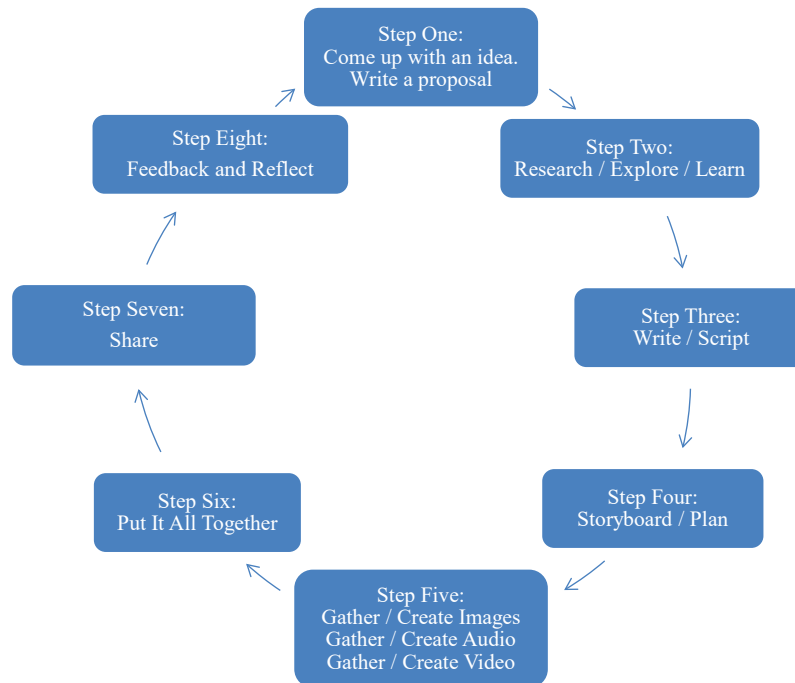
Digital storytelling technology involves specific changes in the pedagogical paradigm. The principle of cooperation prevails in the teacher-student interaction. The teacher is a coauthor and facilitator helping the students choose a topic, structure the digital story, and advise what technical and software tools can be used to create it.

The Center for Digital Storytelling in Berkeley, California, is known for developing and disseminating the Seven Elements of Digital Storytelling, often cited as a helpful point for those starting to work with digital stories. We agree with Robin that «the specific requirements of an educational digital story differ slightly from the original Seven Elements for Digital Stories» (Robin, 2024). Ten Robin's modified elements are the following: the overall purpose of the story; the narrator's point of view; a dramatic question or questions; the choice of content; clarity of voice; pacing of the narrative; use of a meaningful audio soundtrack; quality of the images, video, and other multimedia elements; economy of the story detail; good grammar and language usage.

The digital storytelling process can be divided into three phases: 1) the phase of planning and text preparation, 2) the compilation phase, and 3) the phase of feedback and reflection. The algorithm of work on digital storytelling has been described numerous times in several studies (Leshchenko, Tymchuk, Ruban, 2017; Robin, 2016; Ogawa, Tsuchiya, 2016; Benmayor, 2008; Karpenko, Ajtay-Horváth, 2021; Ruth, Greenidge, 2009). In the following article, we present an algorithm based on a variant given by the Stony Brook University Libraries site (Figure 1).

When implementing digital storytelling, various tools are used, such as infographics, interactive presentations, mind maps, comics, scrapbooking, and various types of videos (explanatory videos,

animations). Their choice depends on the topic and objectives of the lesson, the content, and, indeed, the teacher's or student's creativity and technical skills during active learning. Developing their stories motivates students because it allows them to express their creativity, so storytelling improves their speaking skills and significantly impacts their motivation to learn the language in general and speaking skills in particular (Shkola, Saliuk, 2022).



**Fig. 1. Digital Storytelling Process (Morra, 2024)**

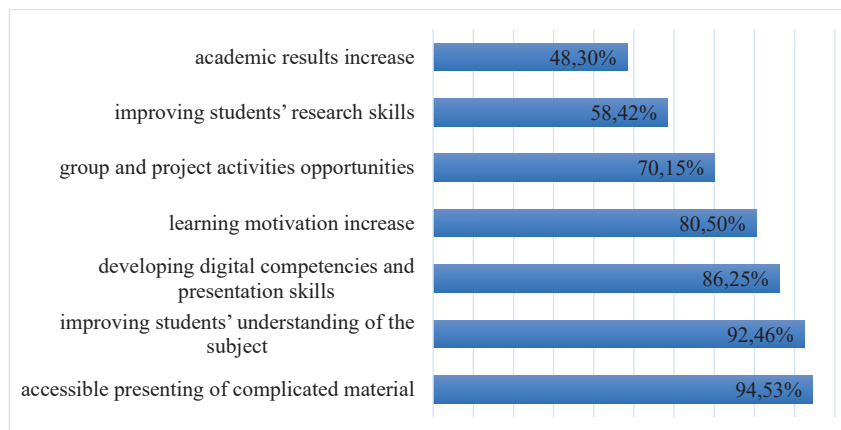
The majority of teachers noted that digital storytelling technologies make it easier to present complicated educational material (94.53%), improve students' understanding of the subject (92.46%), and develop digital competencies and presentation skills through the use of a variety of digital services (86.25%). The increase in learning motivation through the use of storytelling technologies was noted by 80.5% of respondents, and the opportunities for group and project activities of students were mentioned by 70.15%. Teachers also indicated the impact of digital storytelling on improving students' research skills, especially when using analytical storytelling tools and methods (58.42%) and, consequently, increasing overall academic results (48.3%) (Figure 2).

Previous studies proved that digital storytelling contributed to the development of digital, global, technological, visual, and knowledge literacy (Brown, Bryan, Brown, 2005), critical thinking and problem-solving skills (Yang, Wu, 2012; Chen, Chuang, 2020), reflective thinking skills (Saritepeci, 2017; Pieterse, 2018), communication skills (Mnisi, 2015; Karakoyun, Kuzu, 2017; Al-Amri, 2020), creativity and critical thinking (Anggeraini, 2020). Digital storytelling has gained global popularity as various studies have proved its contribution to developing advanced skills.

Numerous studies (Mnisi, 2015; Karakoyun, Kuzu, 2017; Al-Amri, 2020; Wahyuni, Sujoko, Sarosa, 2017; Kallinikou, Nicolaidou, 2019; Chan, Churchill, Chiu, 2017) indicate that digital storytelling can significantly improve students' speaking skills in English language lessons. The research findings suggest that teachers must implement digital storytelling projects throughout 8 to 14 weeks to witness noticeable improvements in students' speaking abilities. According to Sintonen, Kumpulainen, and Vartiainen, digital storytelling contains various features that enhance students' speaking skills. Additionally, compelling digital stories include multiple elements that help students develop their



ability to speak more effectively (Sintonen, Kumpulainen, Vartiainen, 2018). Essentially, digital storytelling enables students to create digital stories and share personal experiences, deepening their understanding of the subject matter and fostering greater speaking fluency (Gurrieri, Drenten, 2019). Digital storytelling aims to evoke a range of emotions in students, enabling them to express their feelings more clearly and enhancing their speaking skills. Additionally, learners will try to personalize their story by recording themselves and reciting the script, which improves their speaking skills, too (Chambers, Yunus, 2017).



**Fig. 2. Benefits of using digital educational storytelling**

Teachers can implement digital storytelling offline (in the classroom) and in distance or blended learning environments. In higher education, digital stories serve as a tool to present new material, stimulate discussion, and simplify complex or abstract concepts. Using multimedia helps with retaining new information and understanding complex subjects. By creating digital stories, students learn to structure their ideas, express their opinions, pose questions, develop narratives, and share their thoughts and knowledge uniquely and relevantly.

Digital storytelling can be implemented in both individual and group work. Group learners are expected to discuss the topic and task together, actively communicate during the story-creation process, and assign responsibilities (note-taker, presenter, leader, etc.). Collaborative activities in digital storytelling improve learners' comprehension and communication skills. When they speak through an animated character, students develop their imagination and improve pronunciation, fluency, grammar, vocabulary, and comprehension. In addition, if teachers use storytelling following Bloom's Learning Outcomes Framework, this teaching method contributes to improved learning (Shkola, Saliuk, 2022).

Digital storytelling can be one of the main driving forces for EFL learners to gradually develop their speaking skills as they gain more confidence in creating various engaging oral presentations for their target audience. Researchers argue that with the support of digital storytelling, EFL learners will have more opportunities to develop their communicative competencies as they focus on developing more interesting learning content for speaking. EFL learners' willingness to speak has also increased after digital storytelling implementation, in which they are constantly encouraged to practice their desired speaking skills, leading to the full achievement of more fruitful speaking learning outcomes. Scholars recommend that foreign language teachers worldwide use digital storytelling at the beginning of a communicative EFL course to motivate EFL students to speak, leading to significant progress in their speaking competencies (Badawi, El Gabas, Mohamed, 2022). As EFL learners gradually become proficient speakers through digital storytelling, they can improve their pronunciation, use meaningful language expressions, and increase their vocabulary. These essential attributes of speaking training are fundamental as students can inspire others to develop their speaking skills to their full potential.

These benefits of speaking skills development are highlighted by Indonesian scholars, who found that many university students studying ESP significantly improved their speaking skills, gradually becoming more competent speakers (Febriyanti, Susanto, 2017). These results coincide with similar Ukrainian research (Shkola, Saliuk, 2022). The scientists claim that “results of over 2 years of practice have shown that digital storytelling helped students to improve their oral skills while practicing their speech during the creation of digital history” (Shkola, Saliuk, 2022, p. 403).

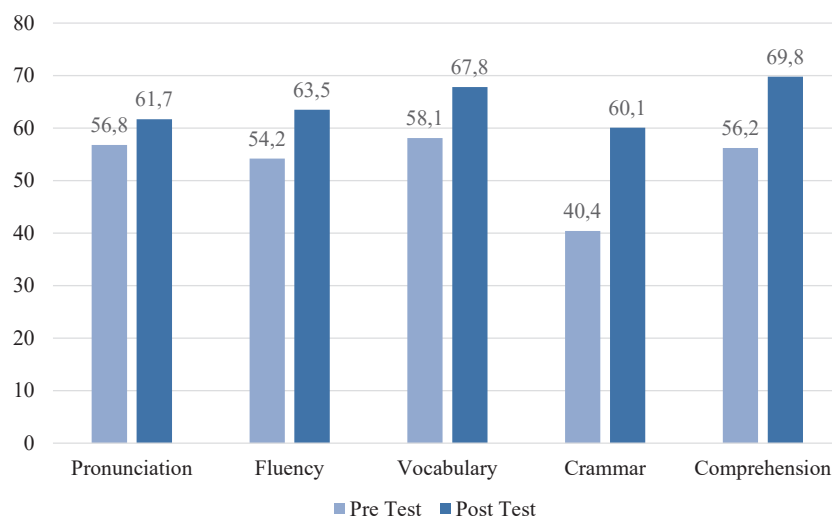
Table 1 shows the pre-test and post-test results of Vinnytsia Institute of Trade and Economics learners. From Table 1, it was observed that students got better grades in the post-test.

Table 1

**Students’ level of speaking ability (pre-test and post-test results)**

Test Score	Level of Ability	Frequency		Percentage	
		Pre Test	Post Test	Pre Test	Post Test
90–100	Excellent	0	5	0 %	14.7%
75–89	Good	6	11	17.6%	32.4%
60–74	Average	13	14	38.2%	41.2%
0–59	Poor	15	4	44.2%	11.7%

Figure 3 demonstrates learners’ speaking skills based on the adapted Harris’s Oral Rating Scale (Helmanda, Nisa, 2019), focusing on pronunciation, fluency, vocabulary, grammar, and comprehension. There was a significant difference between the students’ pre- and post-test mean scores in all five speaking aspects. There was also an increase in the mean score for all five aspects.



**Fig. 3. Comparison of pre-test and post-test results on all speaking aspects (mean score)**

**Conclusions.** The study demonstrates that digital storytelling is an effective pedagogical tool for enhancing speaking skills among higher-education EFL learners. By integrating multimedia elements, digital storytelling fosters personalized learning experiences, motivates students, and enables the development of critical competencies such as communication, cognitive, and research skills. The pre-test and post-test results clearly show improved student performance, emphasizing pronunciation, fluency, vocabulary, grammar, and comprehension advancements.

Digital storytelling also reshapes the teacher-student interaction, promoting collaboration and active engagement. Its implementation supports individual and group activities, improving learners’

abilities to express ideas and engage creatively and critically with content. Furthermore, this method aligns with modern educational paradigms, addressing the challenges of digitalization and creating flexible and inclusive learning environments.

Considering its transformative potential, it is recommended that digital storytelling be widely adopted as a core component of EFL courses, enabling students to achieve higher proficiency and build essential skills for the globalized world. Future research could explore its applications across other language skills and diverse educational contexts to broaden its impact.

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## INTEGRATION OF ARTISTIC-PRODUCTIVE AND THEATRICAL-GAME ACTIVITIES AS A MEANS OF FORMATION OLDER PRESCHOOL CHILDREN'S CREATIVE ABILITIES

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**Abstract.** The article highlights the features of the formation of preschool children's creative abilities through the integration of artistic and productive and theatrical and game activities. The analysis of studies of integration in preschool educational institutions and the issue of the formation of children's creative abilities is conducted. The essence of the concept of «integration» and ways of its implementation in the educational process of a preschool educational institution are determined. The importance of combining artistic and productive and theatrical and game activities for the development of cognitive interests of older preschoolers is substantiated. The influence of art education on the comprehensive development and formation of personality is characterized. The relevance and necessity of the integration of artistic and productive and theatrical and game activities, which provides the opportunity for preschool children to realize their creative abilities and express themselves in creativity is determined.

**Key words:** education, integration, creative abilities, productive activities, theatrical and acting activities.

**Introduction.** Numerous studies in education have shown that today creative thinking is considered to be fundamental skill in life. It can help people to solve both simple and complex problems. Modern life demands from individuals of all ages, including preschool children, to possess creative thinking skills. In a constantly changing and complex world, creative thinking enables individuals to discover innovative solutions, tackle unprecedented challenges, and adapt rapidly to change (Suharyat et al., 2023). Creative thinking skills are crucial for preschool children's development. Creative thinking has an impact on a child's cognitive development (Dilshod, 2019). Therefore, teachers, parents, and the environment should stimulate preschool children's creative thinking.

Creative thinking is an ability of the person to produce original ideas or answers (Duff, Kurczek, Rubin, Cohen and Tranel, 2013) and to perceive new and unsuspected relationships or unrelated factors (Piawa, 2010). Cropley (2001) stated that creativity is finding new ways regard unusual correlations or solutions. Mumford (2003) noted that identifying and defining problems is an important influence on creative performance. Guilford and Hoepfner (1971). stated that creative people are sensitive to the existence of problems and that individuals have few opportunities to demonstrate creative traits without the existence of problems to solve. Although Runco (2007) confirmed that creativity is very helpful for solving problems, he believes that creativity has other purposes, as well. Lemon (2011) also noted that creativity is a multifaceted trait. Several researchers report that recognizing, finding and being aware of problems are predominantly trait of creativity (Cropley, 2001).

**Results of the study.** Integration processes in modern preschool education system are components of general innovation processes and a characteristic feature of modern education. The content and technological aspects of the educational activity of a preschool institution are determined by the strategic directions of development of modern preschool education and provide the implementation of an integrative approach for building the content of education aimed at formation of preschoolers' holistic systemic worldview (Krutii, 2005).

The analysis of modern research shows a great scientific interest in the problem of integration in education (I. Bekh, M. Vashulenko, N. Gavrish, I. Zyazyun, V. Ilchenko, I. Kindrat, O. Savchenko and others). The works of such scientists as: (K. Belaya, I. Kindrat, M. Lazareva, etc.) are significant in the study of the problem of an integrated approach in the educational process system of a preschool educational institution.

The concept of «integration» was introduced into science by G. Spencer in 1857. The scientist linked it with the opposite concept – «differentiation» (from the Latin *differentia* – distinction). The term «differentiation» involves weakening the relationships between the elements of the whole (system) in order to maximize the efficiency of the functioning of each of them. At the same time integration is aimed at combining all elements to ensure the effective functioning of the system as a whole.

Integration (from the Latin *integratio* – connection, restoration) means the unification of any elements (parts) into a whole and the process of mutual rapprochement; unification and structuring of disordered phenomena, increasing the intensity of interaction between the elements of the system, orderly functioning of the parts of the whole. In preschool education, the definition of integration is considered appropriate to be formulated as: Integration is a natural dynamic process that involves the interpenetration and interconnection of elements, sections and educational areas based on a systematic and comprehensive disclosure of processes and phenomena, aimed at ensuring preschool children's integrity of the knowledge and skills. We use the term «integrated» talking about education, approach, classes based on integration (Krutiy, 2018).

The essence of the concept of «integration» most fully reflects the definition given by researcher M. Prokofieva: «Integration is a process of interaction of elements with given properties, which is accompanied by the establishment, complication and strengthening of essential connections between elements on the basis of a sufficient basis, as a result of which an integrated object (holistic system) with qualitatively new properties is formed, in the structure of which the individual properties of the original elements are preserved» (Prokofieva, 2008).

It is necessary to understand the essence of integration, because very often during the organization of the content or procedural aspects of the educational process, the conditions for integration are not fully performed, therefore, integrative formations are replaced by those that are only similar to them, or have some of their features. By the educational process in a preschool educational institution we mean a purposeful process of child's development as a result of his active life in a certain way organized conditions and interaction with pedagogical workers, parents and peers (Krutiy, 2018).

The essence of the integrated approach to the educational process is: combining related material from several sections of the program and different types of children's activities around one topic; mastering with preschoolers a much larger volume of educational material and achieving the integrity of their knowledge in a much shorter period of time; involving preschoolers in the process of active independent acquisition of knowledge; forming the child's creative personality, his abilities; ensuring the opportunity for children to apply the knowledge, skills and abilities acquired from different sections of the program in practical activities. Since the integrated approach to the educational process in preschool education is stated by the State Standard of Preschool Education and all Child Development Programs, teaching teams are trying to creatively modernize it, since integration is able to solve numerous problems of preschool education, and first of all – to improve its quality. It establishes new conditions for the activity of the educator and children, is an effective model for activating intellectual and cognitive activity and developmental learning in an educational institution, which requires the use of various forms of conducting the educational process, which has a great impact on the effectiveness of children's perception of educational material.

Scientists in their numerous researches describe the need to ensure active speech practice by means of various types of children's creativity. Dramatization games as a type of theatrical game (O. Amatyeva, N. Vodolaga) and artistic and productive activity (S. Lasunova, T. Postoyan) are usu-

ally mentioned among them. In numerous works (A. Anishchuk, A. Bogush, N. Gavrish, L. Tanina, O. Ushakova) the indicated types of activity act as a means of development of children's creative abilities and their speech development. Scientists (Yu. Kosenko, Yu. Perenchuk, L. Furmina) studied the creative manifestations of preschoolers in theatrical and game activity, which at its core contains a creative beginning and is an artistic activity itself.

The Basic Component of Preschool Education in the content of the educational line «Child in the World of Culture», in particular, in the section «Content of Theater Education», presents the following results of the educational work of preschool teachers with preschool children: orienting the child in the main types of theatrical art; the ability to analyze the nature and content of a theatrical performance; creating a stage image using brightly expressed expressive means (speech, facial expressions, gestures, movements, music, dance, singing); memorizing the plot sequence of the performance and using one's own artistic experience in organizing theatrical activities.

It is easier for a preschooler to perceive the world around through a fairy tale, because its language is simple and accessible, the plot is transparent and at the same time mysterious. Characters of a fairy-tale fit perfectly to the magical world of children's fantasy. The educational influence of a fairy tale on children is also urgent. Works of this genre demonstrate children models of correct and adequate behavior in various life situations, avoiding unnecessary moralizing and boring instructions. The dizzying change of events, the tension of the plot, the fascinating intrigue can cause children's steady interest in such a genre form. In addition, a fairy tale forms preschoolers' moral concepts, develops expressiveness of speech, lexical and grammatical correctness, sound pronunciation, coherence of expression, general culture of communication, accuracy of artistic speech and vocabulary (Havrysh, 2005).

G. Fadina, O. Filatova note that the usage of a fairy tale includes the following areas of a child's speech development: increasing the level of mastery of lexical and grammatical means of speech, the sound side of speech; improving dialogic and monologic speech. The fairy tale is aimed at enriching and activating the dictionary, mastering the meanings of new words, formation of the emotional state of children, development of children's communicative abilities and skills. Scientists distinguish the following stages of using a fairy tale in the process of formation of preschoolers' speech competence: 1) familiarization of children with the content of the fairy tale, figurative expressions and semantic shades of words; 2) verbal commenting on communicative situations, reproducing the main episodes, verbally reflecting one's attitude to the heroes of the fairy tale, compiling verbal descriptions of the heroes; usage of figurative expressions; 3) theatricalization of the fairy tale, in which an adult invites children to act out individual episodes of the fairy tale.

Therefore, the dramatization of fairy tales by children should be made a common occurrence in the life of a children's institution, involving all children in this. M. Alekseeva, L. Beregov, V. Yashina also highlight dramatization as an effective method of developing speech competence. They note that by dramatizing a fairy tale, the child uses the language of the fairy tale, connects the word with actions and images.

L. Fesyukova identifies the following methods of work with a fairy tale: selecting definitions for the main character (event, phenomenon, object); finding affectionate, beautiful, fabulous, sad words; composing a long and at the same time funny word; analyzing a word with the same spelling, but with different meaning: explaining the origin of the word; making up similar words (synonyms). N. Lutsan suggests that educators to use the following methods of work with a fairy tale to develop preschoolers' speech competence. Among them are composing a fairy tale according to the plan, using schematic images during retelling of a fairy tale. The author emphasizes that first the teacher explains the children how to use this scheme while telling the plot of the fairy tale, and then suggests that the children do it. Also, according to the plan, he suggests to guess and tell the fairy tale (Lutsan, 2005:264).

Theatrical production is also impossible without teaching children to speak beautifully, without stage speech, with the help of which it is possible to convey all feelings and thoughts through words. In a number of works of scientists (N. Abrahamyan, G. Bondarenko, L. Vygotsky, N. Vodolaga, N. Voloshyna, G. Yeskina, N. Miropolska, Yu. Samarina, R. Cherkashin, P. Yakobson) the inexhaustible possibilities of combination of literary and dramatic artistic genres are emphasized. Teaching children the correct performance of the artistic word, the teacher must realize the full depth, importance of this artistic activity and remember that, speaking «beautifully», preschoolers feel the aesthetic quality and richness of their native literary poetry and prose, therefore they will acquire professional skills in the colloquial genre of theatrical art. The creativity of a preschool child is endowed with a social nature, is diverse and unique, and it is precisely this that is the basis of the creativity of an adult artist, because, according to V. Romenets, «creativity, like a daydream, is a continuation and replacement of games with children plays earlier» (Romenets, 2004: 244).

The problem of usage of theatrical activities as a full-fledged and effective means of pedagogical influence on the development of a child's personality is recognized by teachers and psychologists of the past and present (L. Artemova, R. Zhukovska, O. Kononko, O. Kozlyuk, I. Lutsenko, L. Makarenko, D. Menzhderiytska, G. Mykhaylova, G. Marchuk, S. Rusova, M. Shut and others). Researchers mention that the problem of the pedagogical value of theatrical activities and various aspects of the importance of theater in the upbringing and development of a child is rather urgent.

Theatrical activity is a powerful means of speech development for children. While watching a performance, getting acquainted with literary works through the theater, they receive samples of correct, beautiful, emotionally colored coherent speech, proverbs, sayings, phraseological units. During the plot-role-playing game, develops dialogic and monologue speech. During speech-making activity, children use different types of coherent statements to solve specific game, communicative situations (reasoning, explaining, reproducing fairy-tale dialogues, composing their own scenarios, etc.). Speech becomes more understandable, expressive, grammatically formed. The game contributes to the development of plot composition. In the process of preparing and showing a performance, children develop coherent speech, which is emotionally colored and involves the widespread usage of verbal and non-verbal means of expression (after all, preschoolers either reproduce artistic speech plots and thereby assimilate the norm in its highest manifestation, or practice independently composing a plot and – further – a script for a theatrical performance).

Some researchers consider theatrical activities as games based on the plots of literary works (R. Zhukovskaya, V. Zakharchenko, Yu. Kosenko) or as creative role-playing games (T. Markova). Thus, T. Markova notes that in creative role-playing games that arise and develop under the influence of the content of children's books, children combine ideas from the works they have listened to with ideas that they have about the surrounding reality in one game plot. The connection with the text of a literary work in such games is less stable, and children have the opportunity to reflect in one game plot not only the content of any particular work, but also individual episodes from different literary sources, combining them with ideas about the surrounding from their personal experience. That is, we are talking about plot composition as a way for children to organize literary speech material independently – a plot, a scenario – the basis of the game. The author explores this type of game as a play for oneself, that is, in a situation where children do not direct their efforts to perform as well as possible in front of an audience, nor do they take on the dual role of the author. They play for themselves, sincerely giving themselves over to the role of the play.

Children's creativity in theatrical and game activities is manifested in three ways:

- as productive creativity (creation of their own plots or creative interpretation of a given plot);
- performing (speech, motor)
- acting abilities;
- design (sets, costumes, etc.).



It is known that a child of preschool age is able to make a creative image that is distinguished by originality, variability, flexibility and mobility. For a better understanding of the content and role of theatrical games in the development of creative qualities of preschoolers, we will distinguish types of theatrical games. Therefore, theatrical games are divided into two main groups – director's games and dramatization games. Director's games include: toy theater, picture theater, stand-book, shadow theater, flannel board theater. The main purpose of this group of games is that the child himself is not an actor, but only creates scenes, plays the role of a toy staff (volumetric or planar), depicts it with intonation, facial expressions. At the same time, the child's pantomime is limited, since the child acts as a motionless or immobile figure, a toy. Among the dramatization games, the most common are finger games and games with bi-ba-bo dolls. The peculiarity of these games is that the child himself takes an active part in the performed roles, using his means of expression – intonation, facial expressions, pantomime.

Emotions play an important role in creative development, which is confirmed by modern studies of mental cognitive processes – memory, thinking, imagination, which under the influence of emotions act as a stimulus for creative activity. Scientists believe that the creative process is impossible without experiences, without positive emotional reactions. The brightest episodes, which are accompanied by positive or negative emotions, are better remembered by children, are stored in memory and motivate them to creative self-expression. N. Ishchenko draws attention to the regularity in the relationship between memory and emotions: by the number of positive emotions, children remember a significant amount of the content load of the lesson, by the number of negative emotions, not knowledge remains in memory, but negative impressions about the process of their «non-obtention» (Ishchenko, 2018).

Psychologists and educators consider emotions as the most important factor of regulation of cognitive processes, the coordinated functioning of which is considered a condition for the successful implementation of creative activity (I. Bekh, L. Vygotsky, O. Zaporozhets, K. Izard, V. Sukhomlynsky, N. Trofaila, etc.). Thus, K. Izard indicates that emotion «is experienced as a feeling that motivates, organizes and directs perception, thinking and action»; I. Bekh sees emotional experiences as the basis for the development of the spirituality of the individual (Bekh, 2012: 9); N. Trofaila considers emotions to be a specific form of human interaction with the surrounding world, which is aimed at «cognition of the world and one's place in it through oneself» (Trofaila, 2018: 156).; L. Subbotina notes that the richness of emotional states contributes to the development of creative imagination, fantasy and the formation of a child's culture of feelings.

Children are happy to be involved in theatrical activities due to literary, game, and personal motives. In her pedagogical activities, the domestic teacher S. Rusova proved the «dramatic instinct of babies» (Rusova, 2008: 195). S. Rusova also identified two ways of speech development in the process of theatrical games. If children prepare roles in advance, then this contributes to the enrichment of the preschooler's vocabulary, and if the game is played without prior memorization of the text, according to their own interpretation, then the verbal creativity of children develops. Children have various needs in the game that arise under the influence of a literary work, a desire for self-expression, communication, and self-knowledge arises through the reproduction of various images. In a sincere attitude towards the artistic image, its embodiment in forms of theatrical activity, the child reveals both his speech competence and certain knowledge and skills acquired earlier in specially organized training.

The deep and versatile interrelationship of various types of art and children's artistic and creative activities (visual, musical, theatrical, game, artistic and speech, etc.) and its influence on the formation of children's artistic and creative abilities was pointed out by T. Komarova. Under her leadership, the problems of integrating visual activity and music were addressed by S. Kozyreva, games-dramatization and visual activity by O. Trusova, nature and visual activity by O. Yanakieva, objects of the aesthetic cycle by S. Khmarsky, etc.



Research shows that the comprehensive use of the arts in work with preschool children in artistic activities, namely the integration of artistic design and theatrical and game activities, is necessary for the formation and development of elements of aesthetic culture. One of the important elements of aesthetic culture is aesthetic feeling and aesthetic taste.

Artistic design activity is the most important means of aesthetic education. In their creativity, children convey the aesthetic qualities of objects that they noticed and singled out in the process of perception. Creating their own product (drawing, modeling, applique, craft, etc.), children note why they like these products, what is interesting in them, why they please them, and, conversely, what causes a negative attitude. Often, aesthetic assessment is intertwined with moral. Therefore, the manifestation of attitude to works of art is a manifestation of not only aesthetic assessment, but also the social orientation of creativity in preschool children, which is of great importance for the moral education of children (Yaryhina, 2006: 11).

Speaking about the possibilities of socialization of a child of 6–7 years old by means of artistic and transformative activity, it should be noted that the key emphasis in it is determined by the artistic image. A. Ivershyn, K. Bostan carried out a thorough analysis of the specifics of the formation of an artistic image in preschool children in the process of design activity. The researchers indicate: «The artistic image is a connecting link in the cultural dialogue between the object and the consumer – this is a fundamental moment for design». O. Polovina expresses the opinion that the seed of the image, which is found in the joint creative work of children and the teacher, is a source of information that preschoolers activate with the help of attention, imagination and fantasy.

The most detailed analysis of the concept of «artistic and productive activity» was made by M. Stefan. The researcher determines that the basis of this process is the artistic image, which is a characteristic of the author's creative thinking. It is the embodied image, according to M. Stefan, that is a kind of result of this thinking. In the created product – an artistic product, it is fixed, determining the imagery, creative idea and the result of embodiment.

In the process of artistic design activity, favorable conditions are created for the development of aesthetic, emotional perception of art, which contributes to the formation of an aesthetic attitude to reality and to art. Observation and highlighting the properties of objects that should be conveyed in the image (shape, structure, size, color, location in space) contribute to the development of aesthetic feeling of children, the formation of figurative representations, imagination. Artistic activity of children is the creation of an artistic image, when all its characteristic properties are conveyed in the process of observation. In the process of such activities, children develop observation, aesthetic perception, aesthetic emotions, artistic taste, creative abilities; the ability to see beauty in the environment and works of art (Konysheva, 2006).

Musical and theatrical activities affect the development of various aspects of a child's life. They contribute to the development of the intellectual sphere, because through the means of the theater, the child's knowledge about the theater and the people who work there is enriched, he learns to compare the heroes of different fairy tales, plans his own actions to implement the idea of a future performance (Bila, 2010).

The development of the physical sphere includes involving the child in showing individual actions (with toys, fairy tale characters), imitating movements, actions of poetic heroes, using motor actions in the process of theatrical games, selecting movements in accordance with the character's personality. The communicative sphere is coordinating one's own actions with the actions of other children, participating in joint actions with the educator based on the plots of literary works, and realizing the collective nature of the creative act.

Acting abilities of preschool children are such a level of manifestation of the psychological characteristics of the individual, providing them with a stable interest and success in artistic and speech activities (expressive narration of works of art) and successful performance of roles in theatrical

and acting activities. We recognize the possibility of different levels of manifestation of this type of special creative abilities of preschoolers, because experience shows that there are children who are capable of theatrical and acting activities, and there are those who are characterized by giftedness, as a particularly high qualitative level of manifestation of abilities. Talent is the result of a person's conscious and conscientious work on the development of giftedness and therefore manifests itself at a more mature age.

The idea of complex usage of different types of art is very relevant in our time. As O. Ivanenko notes, thanks to the interaction of arts, which acquires great potential in modern education, new opportunities and modern ways of mastering reality are realized. Such an approach ensures the disclosure of the child's personal and creative potential, promotes his artistic and creative activity.

During fine art classes, we offer to depict, mold or construct the heroes of a fairy tale (make a sketch). Each child understands this image in his own way, both graphically and in color. We devote a separate lesson for creation of sketches of future scenery. At this stage, we can organize a competition for the best works-sketches for the future performance. The most interesting stage of the work, we believe, is the manufacture of the heroes of the performance from various materials and the design of the decoration of the future performance. It is desirable that adults – teachers and parents – should be very careful at the stage of making the scenery and heroes of the fairy tale play and not impose their vision. Maximum independence and artistic imagination in creating heroes and scenery is of great importance. If an individual student can work on the image of the hero of a fairy tale (preferably the one who will perform this role), he will convey his vision and his figurative structure of the image. You can work on the scenery in groups. For example, if the scenery changes twice, then each group of 2–3 students will do their part of the work and think it over in terms of form and color (first a graphic image, and then a color image). When the images of the fairy tale are created (finger puppets, a hand puppet, a stick puppet), the children begin to work on the text and movements. At this stage, the most important role is played by the educator or teacher, who can teach how to do this as clearly as possible: diction, movements, emotionality. So that the child does not just memorize the words, but is able to convey the character of the work.

A large number of scientists in their works consider the impact of multimedia technologies on the development of preschoolers' thinking processes, highlighting the factors and consequences of the impact of modern computer technologies on the lives of children in general. A number of scientists (G. Asvatsurov, T. Gabay, L. Gabdulislamova, Yu. Bogachkov, N. Klevtsova, A. Kozlova, S. Novosyolova, T. Pirozhenko, T. Piskunova, M. Sinitsa) note that the usage of multimedia significantly increases the effectiveness of learning, since: the teacher is given the opportunity to transmit a large amount of information with minimal time; dynamic animation attracts and maintains children's interest in the material being studied (engaging memory, attention and imagination); the ability to individualize the pace of information presentation in accordance with the child's intellectual capabilities; presentation of tasks in the form of a game, usually during which a positive emotional response is observed (the specificity of teaching preschool children also lies in the fact that their educational activities are closely related to the game). As the results of numerous studies, the motive for learning will be more effective for the child precisely in the case if in the learning process it is proposed to do something for the game.

As R. Silko notes, «cartoons are a universal and international language of communication between children and adults around the world. Cartoons are very close to the world of childhood, because there is always a game, a flight of imagination, and nothing is impossible. Cartoons are a universal, multifaceted means of child development in the modern visually saturated world. Expressive means of cartoons are the most natural stimulants of creative activity and unfettered thinking for children.» (Trofaïla, 2018).

Plasticine animation is a great mechanism for development child's creative abilities, cognitive interest, and also an opportunity to determine what type of activity a child is more inclined to. There

is a large number of ways to make animated films. This is both hand-drawn animation, and computer graphics, and various types of animation – plasticine, puppet, object. Modeling is one of the most productive types of visual activity and for preschool children, playing with small toys and plasticine characters is very interesting. In addition, during modeling, two hands work synchronously and the work of two hemispheres is coordinated. Plasticine modeling contributes to the development of fine motor skills, which in turn affects the development of speech, memory and thinking.

Modeling provides a lot of opportunities for the development of children’s creative activity. After all, the specifics of modeling classes require, on the one hand, creative activity, constant mental work, imagination, independence, initiative; on the other hand, modeling classes are characterized by a pronounced aesthetic orientation (both in form and content).

The usage of integrated forms of organization of the educational process, firstly, activates educational activity, stimulates children’s informational and emotional perception of educational material, enables a comprehensive consideration of phenomena and concepts, and therefore, adequately meets the needs and abilities of students of this age for holistic knowledge of reality; secondly, it allows to condense the educational process, increase the generalization of knowledge and skills acquired by children, which contributes to the development of the logic and flexibility of the individual's thinking, the formation of his systemic worldview.

**Conclusions.** The problem of formation of creative abilities of children of senior preschool age, theoretical substantiation of the interaction of arts, implementation of programs for the comprehensive development of the child in practice remains to be the most important task of psychological and pedagogical science. The result of the integration of artistic and productive and theatrical and game activities is the holistic artistic and aesthetic development of children, which gives preschool children the opportunity to realize their creative abilities, to express themselves during creative activities. In this case, integration is endowed with significant opportunities for the formation of value orientations, moral and aesthetic attitudes and artistic interest, and active personality formation in children in social relations.

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## THEORY AND PROGRESS OF CULTURE

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### PERSONAL ARCHIVES OF AZERBAIJANI COMPOSERS (BASED ON THE MATERIALS OF THE INSTITUTE OF MANUSCRIPTS)

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**Abstract.** The personal archives of literary and cultural figures who lived and created during the 19th-20th centuries are preserved at the Institute of Manuscripts named after Muhammad Fuzuli under the Azerbaijan National Academy of Sciences. Documents belonging to prominent poets, prose writers, artists, actors, and composers are carefully preserved in their archives.

In the presented article, the archives preserved in the Institute of Manuscripts belonging to Uzeyir Hajibeyli, the founder of the Azerbaijani composer school and creator of the first opera in the East, editor, translator, and pedagogue, Muslim Magomayev, the first professional opera conductor, composer, and public figure, and Zulfugar Hajibeyov, a composer who made significant contributions to the development of Azerbaijani musical culture, are reviewed and analyzed. The archives of the mentioned composers contain handwritten musical scores of their works, biographies and personal documents, letters they wrote and received, materials from various individuals, photographs, printed books, and other documents. These documents are grouped by sections, and the folder in which each document is stored indicates the storage unit, volume, language, and alphabet in which it is written. The article provides information about the documents stored in sections and sub-sections, the importance of the archive in the study of the life and activities of each composer, his creative ties. The creativity of these outstanding composers, in particular Uzeyir Hajibeyli, has been studied from various angles, a large number of books and monographs have been written about them. But their archives have not been studied in a complex way. Although the archives of all three composers have been described and published, some shortcomings are noticeable in these books: some documents have been left out of the description, some documents have not been coded correctly, and the compilation has not been carried out properly. It should also be noted that some scattered documents have been properly grouped and presented in these books, mainly in the book titled "Description of Uzeyir Hajibeyli's archive".

It is impossible to imagine 20th-century Azerbaijani culture and the history of public opinion without Uzeyir Hajibeyli, Muslim Magomayev, and Zulfugar Hajibeyov. From the beginning of the last century to modern times, their works are performed on theatrical stages and win the sympathy of a wide audience. The archives of these personalities are rich in materials about their lives and activities, and many unexplored documents are still waiting for their researcher here. By revealing and researching them, it is possible to give new contributions to the culture of Azerbaijan.

**Key words:** Hajibeyli, Magomayev, archive, section, document, Zulfugar, composer, description.

**Introduction.** The Institute of Manuscripts named after Muhammad Fuzuli under the Azerbaijan National Academy of Sciences, which possesses a rich treasury, preserves the personal archives of literary and cultural figures. One of them is the archive of Uzeyir Hajibeyli (1885-1948), the creator of the first opera in the East, a prominent Azerbaijani composer, playwright, publicist, and public figure (ANAS IM, f.17, 941 s.u.). The composer's wife, Maleyka khanum, presented the archive to the Institute of Manuscripts in 1965. Fund No. 17 consists of 941 storage units. The first and last dates of documents cover the period from 1871 to 1948.



The archive No. 25, consisting of 188 storage units, of Muslim Magomayev (1885–1937) – one of the founders of Azerbaijani classical music, composer, the first professional opera conductor, public figure, and pedagogue, is preserved at the Institute of Manuscripts named after Muhammad Fuzuli under the Azerbaijan National Academy of Sciences (ANAS IM, f.25, 188 s.u.). The first and last dates of the documents stored in the archive cover the period from 1901 to 1984. The materials were submitted to the Institute of Manuscripts in different years – in 1968, 1974 and 1990. For this reason, the sections of the same name have been repeated several times.

Zulfugar Hajibeyov (1884-1950), who had exceptional services in the development of Azerbaijani musical culture, was born in Shusha, a charming corner of Azerbaijan. Certain information about the composer's life and work is provided in the books “Shusha theatre” (Alioglu, 2001: 106), “Shusha is the cradle of music” (Shusha is the cradle of music, 2012: 36), and “Prominent figures of Shusha” (Seyidbeyli, Nazarova, Namazova, Nuriyev, 2022: 102-106). These examples highlight important aspects of the composer's biography. However, it is possible to study his creativity and activities more comprehensively by examining his archive. The archive (ANAS MI, f.29, 118 s.u.) was submitted to the Institute of Manuscripts named after Muhammad Fuzuli under the Azerbaijan National Academy of Sciences by the family in 1965. Fund No. 29 consists of 118 storage units and is grouped in eight units. The first and last dates of documents cover the period from 1899 to 1949.

**Discussion.** Documents in the Uzeyir Hajibeyli archive are grouped into 13 sections: U.Hajibeyli's musical manuscripts, manuscripts of U.Hajibeyli's works; U.Hajibeyli's reports, speeches and notes; letters, telegrams, and applications sent by Uzeyir Hajibeyli to various individuals and places; letters, telegrams, petitions and appeals from various individuals to U.Hajibeyli; U.Hajibeyli's biographical documents, materials collected by the fund owner, materials about the fund owner, photos, family documents, programs, materials by other authors included in the fund, printed materials.

The section on Uzeyir Hajibeyli's musical manuscripts is divided into seven subsections: stage works: operas, operettas, music for cinema; instrumental works, dances, works for piano, tar and kamancha, vocal works, the State Anthem of Azerbaijan, musical notes, and excerpts from various works. Here are kept the scores and lyrics of the operas “Koroghlu” and “Firuze”, the arias of Asgar, Gulchokra, and Telli from the operetta “Arshin Mal Alan”, the operetta “Husband and wife”, Goydamir's song from the film “Villagers”, the overture “Homeland and front” from instrumental works, the songs and dances “Song of the Warriors”, “I hold a three-stringed saz”, “Epic of Victory”, “The tale of the wounded warrior”, “Pencereden dash gelir”, “Sevgili canan”, “Sensiz”, “Cesme axar serin-serin”, “Arazbari”, “Yalli”, “Cengi”, piano, tar, kamancha, and vocal works. The archive also contains musical scores and lyrics of various versions of the State Anthem of Azerbaijan, the musical scores and lyrics of the “Victory Anthem” written for choir by Samad Vurgun. The composer's notes are of various contents. They mainly include musical notes, excerpts from various works, the construction of the tar, and so on.

In the first half of the section on manuscripts of U.Hajibeyli's works, several copies of the composer's textbook “Fundamentals of Azerbaijani Folk Music” in Russian are kept. The work theoretically examines folk music, presents scientific considerations, and provides an overview of the classification of the tonal system of folk music. U.Hajibeyli “identified and developed many stylistic features and aesthetic principles of Azerbaijani music, both in music and theory. In his creative work and theoretical research, issues such as folk character, tradition and innovation, national identity and internationalism were raised and highlighted for the first time” (Safarova, 2000: 125).

The following sub-chapters of the section on manuscripts of the composer's works contain typescripts of U.Hajibeyli's musical comedy “Er-arvad”, the operas “Koroghlu” and “Leyli and Majnun”, the work “Homeland and front”, as well as Zulfugar Hajibeyov's work “A Young Man at Fifty” (in Russian). In addition to his monumental scientific work “Fundamentals of Azerbaijani Folk Music”, Uzeyir Hajibeyli is the author of valuable articles on topics such as mugham and folk songs, the

educational significance of the stage, Turkish operas, translation in music, and folk character. In his article “From Leyli and Majnun to “Koroghlu”, the composer provides some information about his creative path: The success of “Leyli and Majnun” definitively defined my creative path. In 1909, I wrote a second opera, the opera “Sheikh Sanan”, and the musical comedy “Husband and Wife”. In 1911, I worked on two musical dramas – “Asli and Karam” and “Shah Abbas”. Both of these now differ from “Leyli and Majnun” in terms of musical texture. My own music plays a major role in “Asli and Karam” and “Shah Abbas”, and the most important thing is that these works are more substantial and more competently arranged for the orchestra” (Hajibeyli, 2002: 507).

As a great public figure, U.Hajibeyli made speeches and reports at various events of state importance. Some of these speeches and reports are preserved in the composer's archive. For example, his reports on the opening ceremony of Azerbaijani Arts Days in Moscow, his Moscow trip, the farewell speech at H.Sarabski's gravesite, and so on.

In Uzeyir Hajibeyli's archive, alongside musical notes, there are also various notes on topics such as the children's creative olympiad, literature, architecture, and the structure of the tar.

The letters, telegrams and petitions sent by U.Hajibeyli to various people and places are related to his compositional, social and pedagogical activities and were addressed to T.Guliyev, the chairman of the Azerbaijani SSR CPC, Abbasov, director of the Baku State Opera, Rikharev, the chairman of the Baku Soviet, Flasov, director of the State Philharmonic, Kevorkov, director of the Tashkent Independent Theater, Frunze Musical Theater, M.Ahmadov, director of the State Theater named after K.S.Stanislavsky, Sidorov, the chairman of the Moscow Soviet, Zagursky, the head of the Leningrad Soviet Department for Art, Rahimov, the chairman of the Nakhchivan Central Executive Committee, Romanenko, the head of the Uzbek State Theater, Yashen, the head of the Department for Art Affairs of the Uzbek SSR CPC, director of the Uzbek Theater, Huseynov, republican prosecutor, Rahmatullayev, the chairman of the Department for Art of the Tajik SSR, head of the Shahtakhtli Village Club, M.Ibrahimov, S.Rustam and other persons. The number of letters is about 100.

The main part of the archive consists of letters, telegrams, petitions and instructions addressed to Uzeyir Hajibeyli by various people. Some of these are documents related to his election as a deputy to the Supreme Soviet, receiving a State Award, congratulations on birthdays and holidays, some are documents related to the composer's work, and some are documents related to personal matters. Many letter authors ask U.Hajibeyli for help with various issues (providing housing, receiving musical education, organizing a theater, financial support, etc.). The letters were mainly from Baku and the regions of Azerbaijan – Shusha, Agdam, Nakhchivan, Julfa, Kirovabad (Ganja), Sheki, Guba, Lerik, Karyagin (Fuzuli), Pushkin (Bilasuvar), from Russia – Moscow, Leningrad (St. Petersburg), Chelyabinsk, Penza, Rostov, Kuybyshev, Ufa, Derbent, Makhachkala, as well as Vilnius, Frunze, Tbilisi, Batumi, Ashgabat, Bukhara, Berlin, Minsk, Brest, Simferopol and other cities.

The archive primarily contains letters written by ordinary workers. In addition, the archive contains documents addressed by well-known literary and cultural figures of the time, including Khan Shushinski, Sh.Abbasov, Head of the Baku Film Studio, Bulbul, A.Badalbeyli, A.Agdamsky, F.Amirov, Niyazi, G.Garayev, M.Rostropovich, R.Rza, S.Rahman, S.Hajibeyov, S.Rustam, and others, as well as documents from various organizations and institutions: the Azerbaijan Radio Committee, the Azerbaijan Society of the Blind, the Dagestan Radio Committee, the faculty of the Asaf Zeynalli Azerbaijan State Conservatory, the collective of the State Symphony Orchestra, the Department of Arts, the Kyiv Conservatory, the Moscow Art Institute, the collective of the Music Technical School, the collective of the Opera and Ballet Theatre named after M.F.Akhundov, and the collective of the Russian Drama Theatre. It should also be noted that the number of letters and telegrams written to U.Hajibeyli is 579. Although the date of writing of most documents is not mentioned, the documents whose date is indicated mainly date back to the beginning of the 40s of the last century.

U.Hajibeyli's biography documents are placed in sub-sections such as documents related to his personality, materials related to his literary activity, materials related to his social activities. The documents here are of different content. Documents related to his identity include membership booklets, admission cards, invitations, and receipts; materials related to his literary activities include reports and correspondence related to the work "Arshin mal alan", and a dissertation opinion; materials related to his public activities include a reference and instruction from the Executive Committee of the Baku Council, a program for a concert, correspondence related to his deputyship and other issues, decisions of the Council of Ministers of the Azerbaijan SSR, orders of the Department of Arts of the Azerbaijan SSR, reports, information, summons, mandate, decisions, programs, summonses, and invitations. The date of some materials in the archive (list of members of the Azerbaijan Composers' Union, application, work plan, inspection results, action plan, U.Hajibeyli's report) is unknown.

V.Bakher's 78-page scientific research work entitled "Nizami's life and works" is included in the section of materials collected by U.Hajibeyli, a poem dedicated to U.Hajibeyli, notes taken from the "Sovqat" newspaper about the work "If Not That One, Then This One", and telegrams sent by various individuals to each other are included in the section of materials about the fund owner.

The Uzeyir Hajibeyli archive contains 63 photographs and photo reproductions, which depict the composer himself, his life and work, materials related to the Azerbaijani literature and arts exhibition held in Moscow in 1938, as well as the work "Arshin Mal Alan". The family documents section contains 26 documents about U.Hajibeyli's mother Shirin khanum, 24 personal letters and telegrams of the family, as well as 10 financial documents. The documents are handwritten and typewritten in Azerbaijani and Russian. A certain part of the fund is made up of programs. 59 programs of various performances and concerts are kept here, mainly covering the years 1908-1945.

Materials by other authors included in the collection constitute the main part of the archive. Here, works by Azerbaijani and foreign authors, such as plays, poems, and biographies, are preserved, along with various documents including references, applications, resolutions, orders, regulations, protocols, opinions, lists, theses, notes, plans, reports, as well as letters and telegrams. The printed materials section contains U.Hajibeyli's "Harun and Leyla" (1915), "If Not That One, Then This One" (1916), "Koroghlu" and "Ashiqsayagi" (1937), "Shah Abbas and Khurshudbanu" (no date specified), as well as Mir Mohsun Navvab's "Vuzuhul-Aqdam" ("Explanation of Numbers", 1913), M.Tomara's "Babek" (1936), as well as the booklets "The first all-union review of folk musical instruments" (1939), and "For the Motherland" (1941). Also kept here are the libretto of the opera "Qaraja Choban" written by U.Hajibeyli on the theme of the "Dede Gorgud" epics, the programs of the Azerbaijan SSR Folk Music Creativity Olympiad, the children's artistic amateur concert, the All-Union Competition of Composers and other various events, copies of photos related to U.Hajibeyli's literary and social activities (53 pieces), and the notes of T. Bakikhanov's symphonic mughams "Neva", "Humayun", "Shahnaz", "Rahab", and "Dugah". Since these materials were later included in the composer's personal archive, they were not included in the sections corresponding to the topics. In total, the archive contains over 600 letters and telegrams, around 120 photographs or photo reproductions, and more than 70 programs. The archive is comprehensive and rich in terms of volume and subject diversity of documents, including works by the composer and other authors.

Uzeyir Hajibeyli excelled in both musical and literary creativity, achieving great heights in both fields. "Based solely on the work "Arshin Mal Alan", it can be said that Uzeyir Hajibeyli began to gain recognition not only in the Transcaucasian and Central Asian republics but also in the countries of the Near East. The comedy was staged in America, France, England and a number of other foreign countries and translated into most languages of the world brought Uzeyir Hajibeyli worldwide fame" (Abbasov, 2005: 14).

The composer's archive was illustrated and published in 2018 (Alibeyli, Imanova, 2018). In the book, archival documents are grouped and listed in nine sections: U.Hajibeyli's biographical docu-

ments, U.Hajibeyli's works: manuscripts and typescripts, letters and telegrams of U.Hajibeyli, letters and telegrams written to U.Hajibeyli, various documents related to U.Hajibeyli, materials related to various individuals, materials related to unknown individuals, photographs, printed books.

In the archive, some documents, such as letters, notes, and telegrams, are grouped in a scattered manner, but they are presented systematically in the descriptive book. For example, letters addressed to Ibrahimov, Abbasov, and Guliyev were included in materials related to the composer's public activities, and letters written to his wife Maleyka were included in family documents. The same can be said about the documents addressed to U.Hajibeyli. For example, in storage unit 659, 24 congratulatory letters from various organizations and individuals are listed in the composer's biographical documents section. These are included in the appropriate section in the book. Another example: although Zulfugar Hajibeyov's letters were in the section of letters addressed to U.Hajibeyli by various persons, the letter dated June 15, 1940 was included in family documents. In the description book, each of these is placed in the appropriate section. The same ideas can be applied to U.Hajibeyli's biographical documents. Congratulations, personal correspondence and various correspondence related to his deputy in this section are systematically grouped in the book "Description of the Uzeyir Hajibeyli archive".

Ethnomusicologist Fattah Khaligzade highly appreciates the composer's creativity and writes: "Uzeyir bey, who erected the Azerbaijani professional composer school with a written tradition on a rich oral heritage and, first of all, on the basis of folklore music, spread the glory of our Motherland all over the world, diligently studied its inexhaustible folk tunes throughout his life and passed the keys to its scientific research to future generations of musicologists" (Khaligzade, 2014: 220). It is no coincidence that back in 1927, U.Hajibeyli, together with his close friend Muslim Magomayev and his older brother Zulfugar Hajibeyov, published a collection of notes consisting of 33 folk music. It should be noted that Muslim Magomayev was born on the same date as the great Uzeyir Hajibeyli. "The close relationship and friendship of these two powerful artists, which carried the responsibility of the vibrant rise and development of our music and musical theatre at the beginning of the 20th century, was primarily and fundamentally due to their shared profession and similar path" (Huseynov, 1987: 41). They met at the Gori seminary, and this acquaintance turned into a strong friendship. Later, they became relatives, and one of the Teregulova sisters, Maleyka khanum, married Uzeyir Hajibeyli, and Badiguljamal khanum married Muslim Magomayev.

The documents in the M.Magomayev archive are grouped into nine sections: M.Magomayev's musical manuscripts (stage works: a) operas, b) musical comedy, c) various works), text works, M.Magomayev's letters, letters to M.Magomayev from various individuals, and documents related to M. Magomayev's personality, materials related to literary and social activities, descriptive documents, family documents, documents of others included in the fund, printed books, magazine and newspaper clippings, posters and announcements.

M.Magomayev's "Nargiz" (1935) is the first opera in the European style. The archive contains manuscripts of this work, the famous operas "Shah Ismayil" (1916) and "Iblis" (the date of writing is not recorded), the four-act musical comedy "Khoruz bey" (1929), Azerbaijani folk songs, Azerbaijani dance music, music for the radio, music written for the work "Oluler", and marches.

The section of text works contains the librettos of the operas "Nargiz", "Seyfal-Muluk", "Shah Ismayil", "Deli Mukhtar", the operetta "Khoruz bey", and the work "The Road to Hell". These texts are in Azerbaijani and Russian. It should also be noted that the archive also contains the composer's 16-page memoirs, which describe the history of the creation of the opera "Shah Ismayil", its staging, and the difficulties encountered in this regard. The memoirs are an autographed copy written in Russian.

The number of M.Magomayev's letters to his family and various persons is 66. Most of the letters were written to his wife Badiguljamal khanum, sons Jamaladdin and Muhammad, and are of a family



theme. In his letter to the chairman of the Azerbaijan Radio Committee, Magomayev discusses the development of Azerbaijani music and emphasizes the importance of creating symphonic works. The archive contains letters to M. Magomayev from prominent figures of the time, 29 of which are in number. Letters from U. Hajibeyli, H. Teregulov, A. Tuganov, Sharifov, director of the Azerbaijan State Museum named after J. Jabbarli, Honored Artist P. I. Amirago, and other individuals are mainly about the staging of the opera "Nargiz", and some are devoted to personal topics. The composer's correspondence, letters addressed to him, are in Russian and cover the years 1904-1937.

Documents related to M. Magomayev's identity are varied. Here, his student notebooks, certificates of various content, notes, mandates, credentials, contracts with organizations and institutions related to the writing of individual works, receipts, documents covering the years 1935-1937 related to the composer's illness, his personal file, honorary certificates, and other documents are preserved. Materials related to M. Magomayev's literary and social activities are important in obtaining comprehensive information about his work. The descriptive documents section contains photos of the composer alone, with school friends, with his family, with opera artists, as well as actors Huseyngulu Sarabski in the role of Shah Ismayil, Hagigat Rzayeva in the role of Arabzangi, the final scene of the opera "Shah Ismayil", a group of musicians, and other materials.

The family documents section includes Muhammad Magomayev's certificate, a letter from Maleyka khanum (U. Hajibeyli's wife) to Badiguljamal Magomayev, condolence telegrams sent to Badiguljamal khanum regarding Magomayev's death from various individuals, as well as from the Nalchik Arts Workers' Directorate (7 pieces), a reference about Badiguljamal khanum's pension, her deposit book, and application.

The archive also contains materials by other authors: Yusif Shirvan's poem "On the Honorable Path", notes of various musical works (96 sheets), Sattarov's report, a work called "Qonche", Ayshat Magomayeva's petition, a leaflet issued on the occasion of Jamaladdin Magomayev's election as a deputy to the Supreme Soviet of the Azerbaijan SSR, etc. The archive also contains printed books published in various years, programs, posters, and announcements, as well as journal and newspaper clippings, which can be considered significant for studying the literary and cultural environment of the time.

Academician R. Huseynov, using M. Magomayev's personal archive materials at the Institute of Manuscripts: memoirs, letters, and other documents, created a significant artistic and documentary work reflecting his life path (Huseynov, 1987: 9-150). Literary critic E. Akimova, in her book about the life and work of M. Magomayev, his literary environment, and musical heritage, used the memoirs of various people: G. Mammadli, H. Rzayeva, B. Mansurov, and others, epistolary examples, as well as R. Huseynov's work "Green Leaf". Although the author used M. Magomayev's personal fund No. 222 in the State Archive of Literature and Art, she did not delve into his archive at the Institute of Manuscripts. However, there are valuable documents here about his life and composing activities. However, the researcher, approaching it from the perspective of the contemporary era, concludes that "the dimension and weight, the aesthetic balance of Muslim Magomayev's musical works outweigh the demands and desires, patterns and dogmas of that era". Perhaps that is why, in the 90s, when we entered a new era, the attitude towards Muslim Magomayev's work did not change, and two different periods of time did not contradict each other in the assessment of his life and artistic work" (Akimova, 2017: 8).

Muslim Magomayev archive Illustrated and published in 2005 (Mammadova, 2005). It should be noted that the book does not contain a description of all documents in the archive. In general, the document under 33 storage units is not described and not included in the book. The information about some materials is incorrect in the book. The book states that in the photo preserved in storage unit 81, H. Sarabski is in the role of Arabzangi (Mammadova, 2005: 133). In fact, H. Sarabski played the role of Shah Ismayil. While M. Magomayev's son's name is Jamal



(Jamaladdin), in some parts of the description book it is given as Jamil. (Mammadova, 2005: 73). There is a discrepancy in the grouping of some materials. For example, Magomayev's diary, biography and memoirs are listed in the description book in the section documents on his personality. However, these were to be given in the biography and memoirs section. Indications for some documents were not noted. For example, the storage unit of the material titled "Song tunes and songs" (Mammadova, 2005: 39); the language in which the petition was written on January 13, 1931, its content, first and last sentences, size, volume, storage unit (Mammadova, 2005: 93); the dimensions and volumes of the certificate issued on October 19, 1962 (Mammadova, 2005: 101), the extract from the work book, the savings book, and the reference (Mammadova, 2005: 102) were not specified. The number of similar documents (contracts, official letters, certificates, invitations, programs, materials related to the composer's illness) is not indicated. All of the above, since they do not comply with the principles of description, have damaged the layout of the book "Description of the Muslim Magomayev archive", leading to fragmentation and disorganization.

It should also be noted that a bibliography about M. Magomayev was published in 2011. The main feature of the bibliography is that it provides not only the key dates of M. Magomayev's life and work, opinions of prominent figures about him, articles published about his works in periodicals and journals, as well as information about books, dissertations, and author's abstracts on his life and work, but also the references to the manuscripts stored in the Institute of Manuscripts ANAS. In her preface to the bibliography, Doctor of Art History Imruz Efendiyeva states that M. Magomayev's work was widely promoted at the Baku Academy of Music named after U. Hajibeyli: "I think that his archive contains many wonderful, interesting materials that have not yet been explored by us musicologists" (Efendiyeva, 2011: 9). When examining the composer's archive, one can conclude that the scientist was not mistaken in his thoughts.

The first section of the documents of the great U. Hajibeyli's brother, Zulfugar Hajibeyov, which consists of eight sections, includes musical manuscripts of stage works and various materials. The sheet musical manuscripts of stage works consist of three subheadings: operas, operettas, songs and marches. The operas include "Ashug Garib", "Malikmammad", "Nushaba", "Three ashugs", the operettas include "Single while married", excerpts from musical comedies, the songs and marches include marches and songs intended for the soldiers of the Azerbaijani division, the battle march, the song "Homeland army", the song of Ismayil, school and children's songs, the songs "Don't lose your hope for me", "I cry, she smiles", as well as fragments of various songs and melodies. The various materials included notes compiled for a music textbook, a manuscript of the "Lezginka" dance, as well as an incomplete score and a clavichord.

Section II contains manuscripts and typescripts of Zulfugar Hajibeyov's works, notes, and biography. This includes the texts of the operas "Ashug Garib", "Malikmammad", the ballet "Maiden tower", the musical comedies "Competition", "15-year-old bride", "Then so, now so", "Mashadi Khudu's everyday life", notes on theater and music, and a manuscript and typescript of the composer's 6-page biography in Russian.

The archive preserves two letters written by Zulfugar Hajibeyov to the Central Committee and Abdulla Shaig in 1944 and 1946, which are located in Section III under the title "Letters of Zulfugar Hajibeyov". In a letter addressed to the Central Committee on April 26, 1944, the composer stated that he was working on the opera "Nushaba" as well as the libretto for a new musical comedy, and that living in a one-room apartment was hindering his work, and asked for assistance in improving his housing conditions. The letter to Abdulla Shaig, dated July 25, 1946, was sent by Zulfugar bey and his wife Boyukkhanim Hajibeyovs. The authors of the letter congratulate the writer on the occasion of the performance of "Nushaba", wish him to create more beautiful works, and evaluate the performance of the work as a great holiday for Azerbaijani art workers.

Letters from various individuals to Zulfugar Hajibeyov are placed in section IV. Telegrams from Niyazi Taghizade, Safar Samadov, as well as various persons are in Russian, and an unsigned letter is in Azerbaijani.

Zulfugar Hajibeyov's biography documents are included in Section V. Cards, mandates, invitations, congratulations, references, notifications, personal sheets and official letters in Azerbaijani and Russian languages are kept here. The archive contains 60 documents consisting of 74 sheets related to Zulfugar bey's work, which cover the years 1928-1944.

10 photos are stored in the descriptive documents included in Section VI. These are the images of the composer with his family and acquaintances, as well as the single and funeral of his uncle, Ahmed Agdamsky, Hussein Arablinsky. Compared to other archives kept at the Institute of Manuscripts, photos are a minority in Zulfugar Hajibeyov archives.

The archive also contains materials from various persons, which are placed in Section VII. This includes the libretto of Abdulla Shaig's "Nushaba", texts of various songs, excerpts from Uzeyir Hajibeyli's operas "Leyli and Majnun", "Asli and Karam", the operetta "Husband and Wife", the libretto of the opera "Gachag Nabi", notes, excerpts, poems and other documents of various contents about Firdovsi.

The VIII section, where printed materials are stored, includes Sultan Majid Ganizade's "Evening patience is good" (1913), Zulfugar Hajibeyov's "Ashug Garib" (1916), the appeal to Muslims by the representatives of the Transcaucasian Muslim clergy and religious figures' congress in 1944, musical notations of folk songs and dances, various programs, posters, as well as copies of the newspapers "A new path", "On the way to the homeland", "Communist", "Lenin's path", "Azerbaijan", and the journal "Education and culture". This section also contains an album dedicated to Sabir's work titled "Mirza Alakbar Sabir's mirror", which includes drawings from "Hophopname".

Zulfugar Hajibeyov archive described by PhD in history Esmira Javadova and published in 2012 (Javadova, 2012). It should be noted that the materials stored in the archive were comprehensively described and presented. However, it would be appropriate to take into account some issues:

Although the book mentions that the first and last dates of documents in the archives are 1894-1950 (Javadova, 2012: 3), in fact, the first and last dates of documents cover 1899-1949.

The description book states that the works of the brothers Zulfugar and Uzeyir Hajibeyov, "Ashug Garib" and "Arshin mal alan", were bound into a book and presented to Huseyngulu Sarabski on the occasion of the 20th anniversary of his stage career, and that the book is preserved in the Uzeyir Hajibeyov archive, fund 15 (Javadova, 2012: 9). In fact, the Uzeyir Hajibeyov archive fund is not 15, but 17, and the book is kept in the Huseyngulu Sarabski archive, fund 15.

Storage unit 44 holds Zulfugar Hajibeyov's letters to Abdulla Shaig and the Central Committee. The book does not include a description of the letter written to Abdullah Shaig. The letter addressed to the Central Committee was included in the section of letters written to Zulfugar bey, and the date of writing was incorrectly indicated as 1946, not 1944 (Javadova, 2012: 51).

**Conclusions.** Documents in the archives of Uzeyir Hajibeyli, Muslim Magomayev and Zulfugar Hajibeyli are important sources for studying their life and activity, their creative relations and how they worked on their works on the basis of primary sources. The archives of these outstanding personalities are valuable resources in the study of Azerbaijani literature and art, and the use of these resources by researchers can create a basis for the disclosure of valuable information, as well as a wider scope of our culture. The examination of the archive of each personality, the provision of general information about the stored documents is important for a deeper and more detailed study of the life and activity of that person. Because many documents that have not yet been published and are unknown to the scientific community are preserved in the archives, which can be a source of future research.

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## SEMIOTICS OF TEXT-VISUAL COMMUNICATION IN UKRAINIAN SOCIAL POSTERS: INTERPLAY OF SIGNS, SYMBOLS, AND CULTURAL NARRATIVES

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**Abstract.** This article examines the semiotics of text-visual communication in Ukrainian social posters, focusing on the interaction between textual and visual elements as a unified system of signs. The findings indicate that the effectiveness of Ukrainian social posters is rooted in the harmonious integration of text and imagery, where each component complements and amplifies the other to create emotionally charged and conceptually rich messages. The posters analyzed demonstrate how semiotic mechanisms—such as metaphor, symbolism, and intertextuality – are employed to evoke empathy, provoke critical reflection, and inspire social action. Furthermore, the research underscores the transformative potential of social posters as tools of cultural memory, capable of preserving historical narratives and fostering a sense of collective identity, particularly during times of societal crisis. This study contributes to the broader field of visual communication and semiotics by providing insights into the role of text-visual interaction in the construction of meaning within social posters.

**Key words:** semiotics, text-visual communication, Ukrainian social posters, icons, indices, symbols, cultural identity, visual rhetoric, typographic design.

**Introduction.** The semiotics of text-visual communication has emerged as a critical area of inquiry within contemporary research on visual culture, particularly in the study of social posters. Social posters, as dynamic forms of graphic design, operate at the intersection of art, communication, and ideology, where the integration of text and imagery serves not only an aesthetic purpose but also a profound socio-political function. The symbolic language embedded within these posters acts as a powerful tool for conveying complex ideas, emotions, and cultural narratives in a manner that is both accessible and impactful. In the Ukrainian context, social posters have played a significant role in reflecting and shaping public consciousness, particularly during periods of social transformation and political upheaval. The recent history of Ukraine, marked by the Revolution of Dignity, the ongoing Russo-Ukrainian war, and the struggle for national identity, has witnessed an intensified use of visual media as a means of social mobilization and resistance. Posters addressing themes such as war, national resilience, environmental issues, and human rights have become not just artistic expressions but also instruments of cultural memory and collective identity.

**The research aims** to explore the semiotic dimensions of Ukrainian social posters, focusing on how textual and visual elements interact to create meaning within a broader cultural and historical context. By applying semiotic theories, the study investigates how icons, indices, and symbols function as key components of visual rhetoric. Special attention is given to the role of cultural symbols—such as the sunflower, the trident (tryzub), and traditional Ukrainian embroidery (vyshyvanka)—which, especially in the context of contemporary military conflicts, have acquired heightened emotional and mobilizing significance.

**Materials and methods.** The research employs a qualitative methodology grounded in semiotic analysis, focusing on the interaction between text and imagery as components of a unified communicative system. The primary analytical framework draws on Ch. S. Peirce's triadic model of signs—

icons, indices, and symbols—to classify and interpret the various sign types present in the posters. This model facilitates a systematic examination of how visual and textual elements function independently and in combination to convey meaning. Additionally, Roland Barthes' theory of myth as a secondary semiotic system is applied to explore how cultural phenomena are transformed into symbolic representations within poster design, particularly in relation to national identity and collective memory.

*Semiotics of text-visual communication in social posters.* Semiotics, as an academic discipline, facilitates the exploration of the interaction between text and imagery, revealing the mechanisms through which these elements influence the perception and comprehension of messages. The study of Ukrainian social posters within this framework enables an understanding of how textual and visual elements establish emotional and cognitive connections with the viewer. Scholars and practitioners in the field of graphic design emphasize that the key to the successful integration of text and images lies in achieving a balance between form and content, with the text complementing—rather than duplicating—the visual component. At the same time, images should convey ideas without the need for verbose explanations, as the application of principles such as conciseness, generalization, unification, and clarity ensures harmony between textual and visual content.

Semiotics, which evolved as a distinct field in the 20th century, investigates the complexities of communication. From a semiotic perspective, a social poster can be viewed as a graphic object designed to transmit information (Potapenko, 2019). In the creation of a poster, the graphic artist determines the most effective way to convey the core message embedded in both text and imagery. At the heart of this communication process lies the information intended for the target audience. The transmission of ideas or content occurs through the use of objects, signs, codes, and communication methods, alongside the active roles of the sender and the recipient. The key components of a poster are the message's content and the method of its realization. Media serve as the channel through which encoded information reaches the target audience, which may consist of individuals or groups.

As the science of signs and sign systems, semiotics is fundamental to understanding communicative processes in social posters. Its foundational principles allow for the analysis of the interaction between textual and visual components within a unified semiotic structure. Notably, Ch. S. Peirce, one of the leading figures in this field, proposed a classification of signs into icons, indices, and symbols, offering a deeper understanding of the semiotic nature of posters. The classical foundations of semiotics are elaborated in *The Collected Papers of Charles Sanders Peirce* (Peirce, 1931–1958; Afisi, 2020), an eight-volume work that presents his triadic model of signs (iconic, indexical, and symbolic). The influence of this theory is evident in the analysis of visual communication, including the graphic design of social posters.

For a more comprehensive understanding of Peirce's sign classification, modern Ukrainian scholars such as O. Shepetiak offer detailed analyses of the relationship between Peirce's sign categories and the structures of language and visual communication. This research is invaluable for understanding how signs function in social posters and which types are most frequently employed to convey socially significant messages (Shepetiak, 2014). Y. Sysoieva (2017) explores psychological experiments on color perception across different cultures, examining its connection to emotional states and symbolism. This work is particularly relevant to poster design, as it highlights the semiotic significance of color as a communicative element. T. Mamchenko (2020) focuses on Peirce's core semiotic categories: Firstness, Secondness, and Thirdness, which enable the interpretation of posters not merely as visual messages but as complex semiotic constructs that shape societal narratives.

Ch. S. Peirce, the founder of pragmatism and semiotics, made substantial contributions to the understanding of the nature of signs and their role in communication. His classification of signs into icons, indices, and symbols has become a cornerstone in semiotic studies (Mamchenko, 2020). According to Peirce, icons are signs that bear resemblance to their referents, meaning the objects they signify. In social posters, icons often manifest as realistic images, photographs,



or illustrations that accurately depict objects or phenomena. For example, a realistic image of a crying child in posters addressing domestic violence requires no additional explanation for the viewer. Such iconic images elicit immediate emotional responses, establishing a direct connection with the target audience. In the context of Ukrainian social posters, icons are particularly effective in addressing specific social issues such as environmental disasters, military conflicts, or violence. The realism of these images ensures their accessibility to a broad audience, minimizing the risk of misinterpretation.

Indices, as defined by Peirce, signify objects through causal relationships or physical associations. In social posters, this type of sign plays a crucial role in establishing connections between events and their consequences. For instance, images of tire tracks on asphalt, shattered glass, or car debris serve as indices of traffic accidents, clearly indicating the dangers of violating road safety rules. Similarly, in posters addressing environmental issues, indices may include images of deforested landscapes, polluted waterways, or deceased wildlife, instantly evoking associations with human activities that have harmed the environment. Indexical signs in posters enhance emotional impact by illustrating consequences that viewers can relate to through their own actions or inactions.

Unlike icons and indices, symbols have an arbitrary relationship with their referents, based on cultural or social conventions. In social posters, symbols function as carriers of abstract ideas that often transcend specific images or texts. For example, the blue and yellow national flag in posters promoting national identity symbolizes freedom, independence, and unity. In environmental posters, the color green symbolizes nature, sustainability, and life. Symbols are highly significant in social posters because they can be easily adapted to various cultural contexts while retaining their core meanings. In Ukrainian posters, symbolism frequently draws on national heritage, adding depth to the message and contributing to the formation of collective identity.

In conclusion, the semiotic analysis of text-visual communication in social posters reveals the complex interplay between different types of signs—icons, indices, and symbols—that collectively create multi-layered systems of meaning. This approach not only enhances the effectiveness of visual messages but also underscores the role of posters as influential tools in shaping public consciousness and fostering social change.

*The Interaction of Icons, Indices, and Symbols in Social Posters: A Semiotic Perspective.* The interplay of icons, indices, and symbols within a single poster creates a multidimensional communication structure that proves highly effective for social influence. In posters dedicated to military themes, realistic depictions of warriors (icons) are complemented by images of destroyed buildings (indices) and symbols of freedom, such as a white dove or the national flag. This integration of different sign types allows for the creation of an emotionally charged and conceptually profound message that resonates with viewers on multiple levels.

The semiotic structure of a social poster is a crucial component of its effectiveness as a communicative tool. Icons provide direct and emotional engagement, indices establish logical connections, and symbols add abstract and cultural meaning. Analyzing Ukrainian social posters in this context enables a deeper understanding of how designers and artists utilize semiotic resources to achieve their objectives. Furthermore, this approach highlights the role of poster art in shaping public consciousness, disseminating cultural values, and mobilizing social activity.

The analysis of text-visual sign systems in the context of social posters is grounded in the foundational works of leading scholars. Roland Barthes, a French semiotician and social theorist, conceptualizes myth as a secondary semiotic system built upon the primary system of language. He examines how cultural phenomena acquire symbolic significance through the process of mythologization, transforming real objects and events into carriers of ideological meanings (Hatam, 2021). This approach is particularly valuable for understanding how social posters employ visual and textual elements to convey complex ideas and influence public consciousness (Barthes, 1957).

In Ukrainian academic discourse, significant contributions to the study of graphic design and semiotics have been made by O. Fedoruk, whose research focuses on the analysis of visual arts, particularly graphic design, and its role in cultural contexts. The author explores how graphic design functions as a medium of artistic and communicative systems, affecting the perception and interpretation of visual messages (Fedoruk, 2006).

Scholars such as D. Solodka, O. Strekalova, and S. Ohanesyan have made noteworthy contributions to the study of semiotics and graphic design, analyzing the semantic differences of graphic signs within various scientific frameworks (Solodka et al., 2020). Their research underscores the importance of semiotics as the study of signs and sign systems, formulating a typology of graphic signs and their role in visual communication. Among other Ukrainian researchers examining the semiotic aspects of graphic design, O. Zalevska (2019) deserves mention. Her studies explore the specificities of graphic design, systematizing the concept of “graphic design” in academic literature and defining the aesthetic impact of art on the creation of graphic objects.

Research in the field of graphic design and visual communication plays a crucial role in developing principles for integrating text and imagery. The works of Ukrainian scholars provide deeper insights into the mechanisms of constructing effective visual messages. In particular, they emphasize the significance of symbolism, metaphor, and cultural relevance in shaping multilayered text-visual messages. The systematic classification of scientific approaches to the analysis of text-visual sign systems is based on the works of leading researchers who have studied the semiotic, cultural, psychological, and structural aspects of communication. This allows for a more profound understanding of the principles governing the interaction of text and imagery in visual media, particularly in social posters.

*Semiotic Approaches to the Analysis of Text-Visual Sign Systems.* The analysis of text-visual sign systems in social posters is grounded in a range of semiotic theories that offer diverse methodological frameworks for understanding the interaction between text and imagery. Semiotics, as the study of signs and their meanings, provides tools to uncover the deeper layers of communication embedded within visual media. This paper explores key semiotic approaches that contribute to the comprehensive analysis of text-visual compositions, emphasizing their relevance to the study of Ukrainian social posters.

One of the foundational concepts in semiotic theory is R. Barthes’ analysis of myths, where myth is viewed as a secondary semiotic system constructed upon the primary system of language. Barthes differentiates between denotation (literal meaning) and connotation (associative meaning), illustrating how texts and images acquire symbolic significance through cultural contexts (Barthes, 2006). This approach is instrumental in analyzing how posters transform everyday objects and visuals into carriers of ideological messages.

Y. Lotman’s concept of the semiosphere expands the understanding of cultural semiotics by defining it as the space in which various sign systems interact. Lotman emphasizes the dialogic nature of texts and their capacity to form cultural narratives through the dynamic relationship between text and image (Lotman, 1990). This perspective highlights how posters operate within a broader cultural ecosystem, engaging with existing discourses while generating new meanings. Ch. S. Peirce’s triadic model of the sign offers a systematic classification of signs into icons (based on resemblance), indices (causal or direct connections), and symbols (conventional associations). This model provides a framework for analyzing the multifaceted dimensions of text-visual communication, allowing researchers to dissect how different types of signs function within posters to convey complex messages (Peirce, 1931–1958).

In the context of Ukrainian poster art, O. Fedoruk’s research conceptualizes graphic design as an artistic-communicative system, exploring its impact on perception through national symbols, cultural contexts, and typography. Fedoruk emphasizes the role of graphic design in shaping visual narratives that resonate with the audience, particularly within socio-political frameworks (Fedoruk, 2006).

The semantic analysis of graphic signs by scholars such as D. Solodka, O. Strekalova, and S. Ohanesyan further refines the understanding of how visual elements interact with textual components to create meaning. Their typological approach to graphic signs reveals the semantic variations that influence the communicative effectiveness of design elements (Solodka et al., 2020).

G. Kress and Th. Leeuwen's grammar of visual design introduces a multimodal approach, analyzing how the structure of visual messages operates within a unified communicative act. Their framework considers both textual and visual modes as integral components of meaning-making processes in media (Kress & Van Leeuwen, 1990). Another influential model is A. J. Greimas' semiotic square, which facilitates the analysis of semantic relationships between textual and visual elements. This tool helps uncover the deeper structural dynamics underlying the organization of meaning in posters (Greimas, 1983). J. Kristeva's theory of intertextuality highlights the interconnectedness of texts, including visual texts, demonstrating how they reference each other to construct new layers of meaning. Intertextuality reveals how posters draw upon and transform existing cultural codes to create fresh, contextually relevant messages (Kristeva, 1980). The psychosemiotic approach developed by O. Zalevska examines the psychological impact of text and imagery, uncovering the emotional potential of posters. This perspective provides insights into how visual media influence cognitive and affective responses in viewers (Zalevska, 2015). Finally, D. Chandler's framework for the semiotic analysis of media texts explores how media function as sign systems that generate meaning through cultural, social, and political contexts. This approach is particularly relevant for understanding the role of posters in shaping public discourse and social consciousness (Chandler, 2007).

The integration of these theoretical perspectives allows for a compact and systematic presentation of scientific approaches to analyzing text-visual sign systems in posters. Applying these semiotic frameworks reveals key principles underlying the construction of visual messages and their practical manifestations in Ukrainian social poster art. For instance, posters addressing environmental issues often combine emotionally charged images of nature with concise, impactful slogans such as "Save Forests for the Future" or "Don't Throw Plastic into the Water". These messages are not merely informational but also motivational, making them powerful tools for influencing behavior.

Similarly, the integration of text and imagery plays a crucial role in anti-war communications. Posters that address the theme of war frequently employ stark contrasts between brutal imagery and peaceful messages. A photograph of a devastated city, for example, might be accompanied by a simple phrase like "We All Want Peace". This juxtaposition amplifies the emotional impact and directs the viewer's focus toward the core message. Through the systematic application of semiotic theories, it becomes possible to decode the complex interplay of signs within social posters, thereby enhancing our understanding of how visual communication operates as both an artistic and socio-political phenomenon.

*The Semiotic Role of Textual Elements in Ukrainian Social Posters.* Textual elements play a dual role as both signifiers and structural foundations within the composition of social posters, serving as powerful tools in visual communication. In the poster "Bakhmut", the word "Bakhmut", formed through the interaction of fragmented text streams, functions as an index, pointing to the chaos and tension associated with war. In this context, the text becomes a symbol of resilience, utilizing typographic design as a visual instrument to evoke emotional responses. This illustrates Roland Barthes' concept of the mythologization of signs, where the word "Bakhmut" transcends its literal meaning to become a carrier of ideological messages.

The poster "Mirror Accusation" demonstrates semiotic complexity through its dual-layered text structure, emphasizing the opposition of two narratives. Here, the text serves both as an icon, representing real-world discourses, and as a symbol embodying conflict and manipulation. The mirrored linguistic planes highlight the polarization of perspectives, uncovering the socio-cultural and political

dimensions of reality perception. Simultaneously, the text interacts with the poster's spatial composition, creating a metaphorical visualization of the concept of conflict.

In the poster "Ukraine – United", text is integrated into the visual form, creating a multilayered symbolic image. The letters of the word "Ukraine," stylized as birds, interact with the poster's color palette, functioning as both an icon of national identity and a symbol of freedom. According to Y. Lotman's theory of the semiosphere (Lotman, 1990), this poster operates within a cultural context where text and image coexist within a unified semiotic structure. The interaction between these elements emphasizes the idea of unity and patriotism, generating a synergistic effect that amplifies the poster's message.

The poster "We Stand" employs text as an indexical sign, indicating resilience and resistance. The large font size, bold lines, and bright colors reinforce the focus on the core message while simultaneously symbolizing collective solidarity and the spirit of struggle. This aligns with Barthes' theory, where text becomes a key element for conveying ideological messages. The typographic design ensures readability and visual dominance, seamlessly integrating into the poster's overall composition. The use of text as an iconic image is vividly demonstrated in the poster "Hatred," where the letters form the contours of eyes, symbolizing observation or judgment. This approach to typography illustrates the concept of visual-textual interaction in graphic design, where text not only contributes to the composition but also retains its semantic significance. The text functions within the semiotic space as a sign system that interacts with cultural and social contexts, enhancing the poster's interpretative layers.

In the anti-war poster "No to War", text serves as the dominant compositional element. The large word "NO" acts as an iconic representation of protest, while the symbolic depiction of a bullet in the center intensifies the anti-war message. This design reflects Barthes' ideas on denotation and connotation, where the text performs not only an informative function but also an emotionally motivational one, amplifying the poster's persuasive power. The poster "Map of Ukraine" illustrates the integration of text and visual elements as a cohesive semiotic system. Typographic components form an iconic representation of the country, serving as a symbol of national unity. The use of the yellow and blue color scheme reinforces the patriotic context, creating a profound cultural and emotional impact that resonates with the audience.

All the analyzed posters exemplify a multifaceted approach to the use of text within the framework of visual-textual communication. The integration of icons, indices, and symbols establishes a multi-dimensional structure that bridges cultural, social, and emotional dimensions, thereby enhancing the effectiveness of communication. The semiotic analysis of these posters reveals how text can simultaneously function as an instrument of information transmission, an aesthetic element, and a vehicle for ideological messaging.

According to the outlined semiotic frameworks, the text-visual sign systems in these posters operate as part of a broader cultural discourse, contributing to the shaping of public consciousness. Based on the analysis of contemporary studies in the field of text-visual communication and an extensive review of social posters, a generalized table has been formulated to systematize the key semiotic aspects that define the interaction between text and visual content. This synthesis not only highlights the complexity of semiotic processes in poster art but also underscores the pivotal role of text in constructing culturally resonant visual narratives.

*The Integration of Textual and Visual Content in Social Posters: A Semiotic Perspective.* The integration of textual and visual content in social posters is a multifaceted process that requires a profound understanding of both semiotic principles and the specificities of visual communication. Contemporary research and practical examples confirm that the effective combination of text and imagery creates optimal conditions for maximizing the impact on the audience, transforming the social poster into not only an informative medium but also a powerful tool for social transforma-



tion. Graphic design is fundamentally based on two key components: images (iconic signs) and text (abstract written signs). The harmonious interplay of these elements determines the success of communication, as signs—being material manifestations—convey messages and facilitate the cognition of objects and phenomena. These signs are formed from simple graphic elements that, in turn, construct complex messages. The meaning of such messages emerges through the interaction of signs, their creation, and subsequent perception.

The study of semiotic aspects of text-visual communication demonstrates that the effectiveness of posters largely depends on the harmonious integration of text, symbols, indices, and icons. However, textual components are themselves multidimensional elements that exert influence not only through content but also through their form of presentation. The choice of typeface, its style, and placement within the poster significantly affect the emotional tone of the message, audience perception, and the emphasis on key aspects. Consequently, the next stage of analysis involves examining the role of typography in poster art as an integral element of text-visual communication.

The systematic classification of scientific approaches to the analysis of text-visual sign systems is grounded in the works of leading scholars who have explored the semiotic, cultural, psychological, and structural dimensions of communication. This systematization provides a deeper understanding of the principles governing the interaction between text and imagery in visual media, particularly in social posters, and serves as a theoretical foundation for further research. The social poster represents a unique form of visual art that combines artistic, textual, and semiotic elements to create effective communication. At its core, it is based on the principles of semiotics—the study of signs, their meanings, and functions. The semiotics of social posters is revealed through text-visual interaction, which generates a complex system of meanings aimed at influencing both the consciousness and behavior of the audience.

An analysis of Ukrainian social posters reveals that, within the framework of text-visual communication, text and imagery form a creolized text—a unified semiotic system where both elements complement each other, enhancing the emotional and semantic impact. The visual component ensures the immediate perception of the core message through symbols, metaphors, and graphic imagery, while the text provides specificity, clarifies the content, or serves as a call to action. It is important to note that the semiotic structure of a social poster is built upon the combination of iconic (images), indexical (references to specific objects or events), and symbolic (abstract signs) elements, which together form a multi-layered system of meanings.

Text in social posters can perform various functions: informational, explanatory, emotionally stimulating, and directive. Its role involves detailing the main message, creating contextual frameworks, and mobilizing the audience. Slogans or short phrases often contain vivid metaphors or alliterations that amplify the persuasive effect. Conversely, imagery is typically designed to capture attention instantly and engage the viewer emotionally. The artistic style, composition, and color palette are selected with consideration of semiotic mechanisms to enhance the overall impact of the poster.

The interaction of text and imagery in social posters is based on the principles of semantic integration, where each element reinforces the meaning of the other. Symbols and metaphors in the visual component can be supported by textual cues or explicit calls to action, creating a cohesive communicative image. One illustrative example is the use of the metaphor of the "green serpent" in anti-alcohol posters, where the visual image of the serpent is reinforced by textual appeals promoting sobriety. This type of semantic integration allows for the creation of multi-layered messages that appeal simultaneously to rational and emotional modes of perception.

**Conclusions.** Symbols in the text-visual communication of social posters play a crucial role in generating emotional resonance and shaping archetypal representations. For example, the depiction of hands clutching a child's toy symbolizes the loss of childhood due to war or social adversity. Such imagery has the power to evoke empathy, activate social consciousness, and motivate action. In these



instances, text serves as an additional means of clarifying and specifying the idea, thereby amplifying its communicative strength.

The integration of textual and visual content in social posters is not merely a technical or aesthetic consideration; it is a semiotic process that constructs meaning through the strategic interplay of signs. The effectiveness of social posters relies on this dynamic relationship, where text and imagery converge to create impactful messages that resonate with diverse audiences. This synergy underscores the transformative potential of social posters as instruments of cultural expression, social activism, and ideological influence.

Thus, text-visual communication in social posters functions as a complex semiotic system that integrates emotional, cognitive, and aesthetic dimensions. This system operates not only through the literal meanings of text and images but also through their connotative associations, which are rooted in the cultural and historical experiences of the target audience. The combination of visual symbols and textual elements enables posters to transcend language barriers, appealing directly to universal human emotions while simultaneously reinforcing culturally specific narratives.

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## THEORY AND INNOVATIONS OF SOCIOLOGY

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### METHODS OF FORMATION AND TECHNOLOGIES OF DEVELOPMENT OF PROFESSIONAL MORAL AND ETHICAL QUALITIES OF FUTURE SPECIALISTS OF THE SOCIAL SPHERE (ON THE EXAMPLE OF THE CARPATHIAN INSTITUTE OF ENTREPRENEURSHIP, UNIVERSITY "UKRAINE")

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**Abstract.** The article examines in detail the methods of formation and technologies of development of professional moral and ethical qualities of future specialists of the social sphere.

The educational process in higher education is based not only on the best examples of domestic and foreign experience of social work, adapted to the conditions of specific regions, but also with the use of quite effective technologies and teaching methods. Overcoming the previously widespread reproductive nature of humanitarian education, a modern methodology is currently being formed in the country, which is built taking into account the variability, openness, and dynamism of forms and methods of training specialists in accordance with the draft industry standard for the specialty «social work».

Purposeful, systematic formation of professional and ethical qualities not only has a positive effect on moral consciousness, contributes to the translation of ethical knowledge into personal beliefs, increases understanding of their social significance, but also creates the necessary moral and psychological atmosphere and stimulates highly moral actions, regulating the behavior of future and current social workers.

Thus, the formation and development of ethical competence of social workers plays an important role in the formation of a social worker as a social work specialist.

Further research on this topic can be devoted to studying the mechanisms of forming moral and ethical qualities in future social workers and developing recommendations of a substantive and procedural nature to increase their level.

**Key words:** moral and ethical qualities, social sphere specialists, Carpathian Institute of Entrepreneurship of the University «Ukraine», practical training, professional activity, training classes, practically-oriented seminars, group discussions.

**Introduction.** An important direction of the formation of a new system of social assistance and public service in Ukraine is its staffing. Numerous institutions in this area need specialists of various profiles who are able to act effectively in the conditions of the development of our society, skillfully use domestic and foreign experience of social work, take into account the dynamics and consequences of globalization processes. Therefore, professional training of students aimed at developing professionalism, as well as creating conditions for the formation and development of personal qualities in both future and working specialists, is of great importance. The educational process in higher education is based not only on the best examples of domestic and foreign experience of social work, adapted to the conditions of specific regions, but also with the use of fairly effective technologies and teaching methods. Overcoming the previously widespread reproductive nature of humanitarian education, a modern methodology is currently being formed in the country, which is built taking

into account the variability, openness, and dynamism of forms and methods of training specialists in accordance with the draft industry standard for the specialty «Social Work».

The specificity of social work training, the practice of which is based on mastering the technology of communication with clients, is to train social workers on the basis of dialogization of the educational process. From here we can formulate a conclusion confirmed by practice about the correctness of using a humanistic approach in the training of social workers, when internal values and unrealized human capabilities are in the spotlight, when the necessary conditions are created for the realization of the potential of the future social worker in the process of professional training, when the educational process, based on mutual trust, is carried out through communication, through partnership between the teacher and the student.

In the training of social workers, the formation of personal moral and ethical qualities comes to the fore as an important component of the upbringing and preparation of future social workers for professional activity. Purposeful, systematic formation of professional and ethical qualities not only has a positive effect on moral consciousness, contributes to the translation of ethical knowledge into personal beliefs, increases understanding of their social significance, but also creates the necessary moral and psychological atmosphere and stimulates highly moral actions, regulating the behavior of future and current social workers.

The essential basis of our study was the works on the professional training of social work specialists L.G. Guslyakova, V.I. Zhukov, I.G. Zainyshev, P.D. Pavlyonka, M.V. Firsov, E.I. Kholostova, A. Boyko, I. Hryga. The scientific works of V.G. Bocharova, L.G. Guslyakova, L.V. Topchy, I.D. Zvereva, N.P. Makhova are devoted to the study of social work values. The features of professional and personal development, the formation of professional competence and readiness for professional activity are considered in the works of O.G. Karpenko, I.I. Mygovycha, M.P. Lukashevicha, A.A. Kozlova, A.Y. Kapskaya.

The purpose of the article is to clarify the ways of forming and developing professional moral and ethical qualities of future specialists in the social sphere.

**Main part.** The objectives of the study: – to reveal the essence and content of the ethical competence of social workers; – to highlight the main moral and personal qualities of a social worker; – to determine the methods of forming and technologies for developing professional moral and ethical qualities of future specialists in the social sphere. Research material and methods. Therefore, in our opinion, the formation of moral and ethical values in future social workers occurs through the use of such pedagogical teaching methods as:

- methods of organizing and implementing educational and cognitive activities (stories, educational lectures, seminars, conversations, experiments, illustrations),
- methods of stimulation and motivation (cognitive games, educational discussions, creating situations of duty and responsibility).

Also in theoretical courses it is advisable to actively use active methods of training, role-playing games, psychological tests, problem situations, sociological and psychological research. These and other forms and methods of work expand the worldview of students, educate them in public interest, tact, delicacy, responsibility, organization, sociability, etc.

**Results and their discussion.** The theoretical basis for the formation of professional ethics of social workers is the consideration of the structure of moral qualities of the individual, the subsystems of which are moral consciousness (knowledge, feelings) and moral behavior (motives, will, skills and habits of activity). The moral activity of social workers is the result of the level of formation of moral consciousness (Abolina, 1992: 120).

The criteria that form the professional ethics of social workers are considered to be: awareness of ethical values; critical review of moral behavior; the presence of moral attitudes; the presence of moral beliefs; attitude to society, profession, work, colleagues, oneself; understanding of the expedi-

ency of ethical norms; the significance of the norm in a specific situation; a complex of ethical and psychological qualities.

Based on these criteria, the moral and ethical qualities of social workers are formed, namely: exactingness, justice, honor and dignity, objectivity, tact, tolerance, etc.

The formation of ethical competence of future social workers is carried out through the organization of the educational process in higher education institutions. According to Yu. Matskevich, the effectiveness of the functioning of the system for forming students' readiness for professional activity depends on a number of principles:

Personal approach as the basic value orientation of a social worker, which determines his position in the process of interaction with the client. A personal approach can be implemented only by that social worker who is aware of himself as a person, knows how to see the personal qualities of his client, understand him and build a dialogue with him in the form of an exchange of intellectual, moral and emotional values.

Professional-targeted approach, maximum orientation and professional direction of all types of students' activities, in the process of their training, to achieve a high level of readiness for professional activity. It is also important to form in the student the ability to directly realize the degree of compliance with professional standards.

A holistic approach, which ensures the unity and interaction of all components of the process of forming the readiness of future social workers for professional activity: external (content, forms and methods of training) and internal (main areas of personality: intellectual, strong-willed, emotional).

A differentiated approach, which means that the tasks of professional training are solved in relation to all students, but the content of this work is differentiated, and the ways and time of achieving results depend on the initial orientation and opportunities for accumulating relevant experience (Mackevych, 2005: 98).

O.G. Karpenko believes that an important method in teaching students is the method of differentiation, based on the fact that professional training carries a fairly strong educational potential, which is an active means of pedagogical influence on the development and formation of the student's personality, and it also allows modeling student learning with an orientation to the specialization chosen by him personally. Hence, she identifies the following priority tasks, where the method of differentiated learning manifests itself most fully:

- orientation of students to future professional activity in the field of «person – person», which involves the formation of target, semantic and personal components of the profession «Social work», the most important characteristic of which is the humanistic attitude of the individual, the perception of a person as the highest value, self-realization of the individual in interaction with his social environment;

- development of professionally necessary moral and ethical qualities, which are the basis of the personal characteristics of a specialist in the field of social activity;

- creating favorable conditions for students' self-affirmation, activation of their socially significant role, public responsibility in the process of adaptation in a new sphere of life (Karpenko, 2004: 53).

O.G. Karpenko concludes that it is necessary to use an integrative method of learning. The justification for this was that by studying individual disciplines, students not only comprehend the basics of the social profession, but also study many issues related to the harmony of human relations in different societies, learn to live in peace with themselves and other people, master moral principles and make a choice of value orientations. Therefore, special disciplines should be offered in an integrative version («Social Psychology», «Social Pedagogy»). Such learning conditions, the researcher believes, contribute to the process of socialization and social adaptation of students, their penetration into the essence of future professional activity, self-knowledge of the extent to which each of them has a tendency towards social or socio-pedagogical work.



It is quite obvious that the theoretical knowledge of students is the starting point in the work on the formation of the necessary professional skills, abilities and personal qualities.

**Discussion.** Let us take the Carpathian Institute of Entrepreneurship of the University «Ukraine» as an example, where students of the specialty «Social Work» already in the first year of study study both general educational disciplines and those that provide a complete focus on the features of social work («Introduction to the specialty», «Pedagogy», «General Psychology», «History of Social Work», «Ethics», «Aesthetics», etc.), thanks to which the formation of professionally motivated attitudes begins to create the image of an ideal social worker, the perception of the requirements for the professional role of a specialist and professionally desired personal qualities.

In the second and third years of study, students master a certain amount of knowledge important from the point of view of the formation of moral and ethical competence when studying the following disciplines: «History and Theory of Sociology», «Social Pedagogy», «Social Psychology», «Psychology of the Individual», «Pathopsychology», «Conflictology», «Theory of Social Work», «Culturology», «Specialized Services of the Social Sphere», «Social Policy» and others, which systematize and deepen knowledge about the specifics of the practical activities of a social worker. While mastering the block of professionally oriented disciplines, students acquire knowledge that contributes to the formation of their professional position, personal and social responsibility.

The fourth year is an important stage in the formation of readiness for professional activity of future specialists, since at this stage the main role is given to training courses on «Social Work Technology», «Social-Psychological Counseling», «Organization of Social-Psychological Trainings», «Practical Professional Ethics of Social Work» and disciplines that reveal the content of social work with different categories of clients (families, disabled people, elderly people, unemployed, etc.).

The curriculum provides for both traditional lectures, seminars and practical classes, and various non-traditional forms of training classes (conducting psychological tests, sociological and psychological research, brain-rings, role-playing games, debates, trainings), which broaden students' worldview, cultivate public interest in them, contribute to the active formation of students' basic professional skills and abilities, the formation of relevant professional and ethical qualities of future social workers (tactfulness, delicacy, responsibility, organization, sociability), that is, they continue the pedagogical process, deepen it, significantly expand the «social-practical» field of future social workers.

Working with scientific literature is one of the main types of independent educational activity of students. Mastering the methodology of this work is an extremely important and necessary means of forming professional competence, and with it ethical competence as its component. Scientific awareness is the intellectual potential of a specialist, which is focused on cognitive activity in the system of certain research skills, without which creative activity within the specialty is impossible. That is why the participation of students in scientific research work is one of the leading tasks of scientific and pedagogical workers of the Department of Social Work of the Institute.

It is worth considering separately the importance of practical training, which occurs due to the implementation of a cycle of complementary practices.

Practice is certainly an integral part of the educational process and is one of the most important components of the professional and personal preparation of a specialist for future activity, and serves as an organic addition to the theoretical courses studied by students. It acts as a means of forming professional skills and abilities, allows the student to adapt to the real conditions of the future profession, provides an opportunity to practically try their hand at the chosen profession, learn to apply the knowledge gained in the educational institution in professional activity, highlights how well the necessary moral and personal qualities are formed, and provides an opportunity to give an objective assessment of the student's professional compliance with the requirements of the profession.

In the process of training future social workers, practice occupies a special place. This is due to the specifics of the purpose and content of professional activity, and hence – with special social sig-



nificance. That is why students of the specialty «Social Work» after graduating from higher education institutions do not have the time and right for professional maturation, they must be practically ready to perform professional roles and functions, if not at a high, then at a sufficient level (Larionova, 2005: 66).

As social work researchers A. Boyko and I. Griga rightly note, during the internship at the agency, the student: realizes what is possible and impossible in social work, as a result of which he forms a realistic approach to his future profession; checks the "effectiveness" of the theories studied in the classroom, that is, tries to apply what he was taught, integrate them into a single whole; dealing with acute social and personal problems, facing complex ethical dilemmas, begins to better realize his thoughts and feelings, to understand how these experiences affect his professional activities (Boyko, Griga, 2001: 98).

In turn, O.G. Karpenko outlines the following special tasks for students that they must complete during practice:

- mastering knowledge about the content, typology, nature of social problems of society and clients and about ways to solve them at the state and personal levels;
- mastering professional skills and abilities of social work with a client;
- deepening psychological adaptation to the chosen profession;
- voluntary (by interest) participation in volunteer activities in public organizations and other social institutions that have a pronounced focus on social or socio-pedagogical assistance in their activities;
- carrying out self-reflection with subsequent generalization of difficulties of various origins and the introduction of their own proposals for the correction of social work (Karpenko, 2004: 57).

At the Carpathian Institute of Entrepreneurship of the University of Ukraine, first-year students undergo educational and introductory pre-professional practice (which is partly of a volunteer nature), where they acquire the first skills of communicating with social work clients. By the way, students have the opportunity to engage in volunteer activities throughout their studies, and, thanks to this, in practice they can see positive and negative examples of professional activity that reflect the real level of ethical competence of social work practitioners.

It is known that in general, first-year students who are going through the adaptation process are characterized by: negative experiences associated with leaving school groups with their moral help and support; uncertainty of motivation for choosing a profession; insufficient psychological preparation for it; inability to exercise psychological self-regulation of behavior and activity (Larionova, 2005: 66). And, obviously, this practice can act, on the one hand, as one of the most effective tools for removing or neutralizing these negative factors, and on the other – it gives students the opportunity to take one of the first independent steps on the path to forming professionally necessary moral and personal qualities.

In the second year, students undergo educational and familiarization practice in state and public organizations and institutions engaged in social work, study the legislative framework of their activities in more detail. In the third year – technological practice, where they consolidate the skills of social and psychological diagnostics and mastery of pedagogical methods. In the fourth year, practice is production, where students have the opportunity to form skills for independent work with a client in social agencies of various profiles.

Therefore, in our opinion, the formation of moral and ethical values in future social workers occurs through the use of such pedagogical teaching methods as:

- methods of organizing and implementing educational and cognitive activities (stories, educational lectures, seminars, conversations, experiments, illustrations),
- methods of stimulation and motivation (cognitive games, educational discussions, creating situations of duty and responsibility).

Also, in theoretical courses, it is advisable to actively use active methods of training, role-playing games, psychological tests, problem situations, sociological and psychological research. These and other forms and methods of work broaden the worldview of students, educate them in public interest, tact, delicacy, responsibility, organization, sociability, etc.

In our deep conviction, the development of ethical competence of practicing specialists is of great importance in practical social work. Ethical standards adopted in the organization and real ethical practice create a climate in the organization that is able to motivate innovation and can enhance the effectiveness of professional activity. Both those employees who have been working for a long time, beginners, and future social workers need to know the essence of business ethics, be able to determine the ethical norms inherent in the organization, develop ethical sensitivity, take into account the interests of all subjects of social work and act in accordance with ethical norms in practice.

Today, only a few percent of those who have received special professional training work in social services and management bodies, and if they do have higher education, then, as a rule, not even in the humanities. Since obtaining a specialized higher education for many workers remains either impossible or undesirable for certain reasons, advanced training courses are gaining prominence for such workers, which partly focus mainly on the problems of organization, financing and management of social services and only briefly touch on the content, methods of working with clients and ethical issues. But increasingly, social service workers are getting the opportunity to gain knowledge on these important issues.

Knowing this in advance, we initiated an unstructured free written anonymous survey after the end of the course in order, among other things, to find out how useful the information received during the mastery of this discipline was for the students.

The following quotes, in our opinion, most significantly confirm the importance of studying the moral and ethical principles of social work as a profession:

«...The main thing is that many real-life examples and ways to solve them were given»;

«...Classes on professional ethics became appropriate for me in the sense that I am in this field recently and by chance...»;

«...This knowledge is necessary in work and, first of all, for myself. Many of the cases given from life touched the finest strings of my soul. This influenced my worldview on the other hand, my vision of some things and attitudes...»;

«...Ethics in our work, the work of a social worker, is the most important thing. After all, respect for the dignity of every person, confidentiality, compliance with the norms of professional ethics, client trust in solving and its problems – this is the work of a social worker»;

«...I find the information about the code of ethical conduct of a social worker particularly useful, it was interesting to hear about codes in other countries»;

«... and ethics were very necessary in these courses. It is necessary in our workplace between colleagues and with our clients»;

«... I heard a lot of interesting things and learned to understand people better. I would like more people, especially those who work in the social sphere, to take this course»;

«... this subject helps us to respect everyone, understand and treat each other politely»;

«... I will try to use the knowledge that you gave me in my work».

It should be noted that in order to improve the quality of work of specialists, it is possible to additionally offer such forms of work as:

- practically-oriented seminars on current problems of social work,
- the use of training sessions,
- holding group discussions,
- solving problem-situational tasks,
- individual workshops, etc.

These forms do not require a long break from the work process, but on the contrary, can be included in the planned activities of the social service, with the aim of timely and systematic improvement of the qualification level of its employees.

It is also possible to develop the ethical competence of social service workers through the use of group work technology. By which should be understood the joint activity of people working in groups on certain tasks and problems, independently directing their activities, choosing the means of their work and establishing the norms of interaction.

The most important result of group work is the transformation of the inner world of its participants. The basis of these transformations is the rethinking of life values. The promotion of this process by a specialist has been called «assicreation» – the generation, «cultivation» of new or rethinking old values in a person or group.

In the process of assimilation, a social worker should not fully identify with the group. His professional duty is to maintain the ability to control the situation if it acquires a destructive orientation. Accretion should not be forced – it should be organically manifested on the basis of processes occurring in the group (Shakhrai, 2006: 120).

The advantage of group work over individual work is to obtain an «additional product» by achieving and using the so-called synergistic effect: the result of group work simply exceeds the sum of the results of the work of its individual members, participants feel comfortable, confident, their activity increases and, as a result, a qualitative leap occurs. The synergistic effect is achieved through the division of labor, specialization, cooperation, integration. A sustainable synergistic effect is achieved at the stage of sufficient maturity of the group.

It is known that group work is used: 1) for corrective purposes, when it concerns one or more members; 2) to prevent social dysfunctions; 3) to ensure the normal development of individual members of the group; 4) to affirm the personality; 5) for the purpose of teaching and fostering a sense of citizenship; 6) for the implementation of one goal or for all these goals simultaneously (Shakhrai, 2006: 122).

Let us pay attention to training as the main method of group work. Training is a planned process designed to supplement the skills and knowledge of participants and check their attitudes, ideas, behavior for the purpose of change and renewal. In the broad sense of the word, training is knowledge of oneself and the world around us, changing the “I” through communication, communication in a trusting and informal setting, an effective form of work for learning knowledge, a tool for forming skills and abilities (Kharchenko, 2005: 51).

The tasks of training are:

- mastering the specified socio-psychological knowledge;
- correction and formation of socio-psychological skills and abilities;
- awareness of the integrity of the socio-psychological existence of people;
- development of the ability to adequately understand oneself and others;
- mastering the techniques of decoding psychological messages coming from surrounding people and groups;
- learning individualized techniques of interpersonal communication;
- sensory cognition of group-dynamic phenomena and awareness of one's involvement in emerging interpersonal situations.

The T-group has two goals: self-improvement of the personality and learning interpersonal communication skills. It performs the function of mental recovery. Participants become more receptive to other people's feelings and needs, become more aware of themselves and their own behavior, help establish adequate interpersonal relationships, increase their sociability, openness, strengthen respect for the environment and a sense of self-worth.

The main task of T-groups is to teach business and personal interaction, manage people and organize joint activities. The work in the T-group is aimed at ensuring that, in an atmosphere of mutual

trust and complete psychological openness, under the condition of psychological safety, each of the participants is able to better understand himself, develop the skills and abilities to get to know other people, and establish trusting relationships with them.

It is advisable to introduce the work of groups of socio-psychological, educational training and professional communication training for employees.

Socio-psychological training (SPT) is one of the methods of active learning and psychological influence, which is carried out in the process of intensive group interaction and is aimed at increasing competence in the field of communication, in which the general principle of the activity of the one who is learning is supplemented by the principle of reflection on his own behavior and the behavior of other group members. SPT is aimed at mastering certain socio-psychological knowledge, developing communication skills of personnel, reflective skills, the ability to analyze the situation, behavior, the state of both group members and their own, the ability to adequately perceive oneself and the environment. At the same time, norms of personal behavior and interpersonal interaction are developed and adjusted, and the ability to flexibly respond to the situation, quickly adapt to different conditions and different groups is also developed (Kandyba, 2004: 41).

The group of communicative trainings includes group variants of behavioral and socio-psychological training. SPT consists of blocks of various communicative skills, for example, skills necessary at the beginning of communication, for interrupting contact, skills of psychological argumentation, active listening, revealing hidden intentions in communication, etc.

Educational trainings are aimed at mastering new information and improving and developing, first of all, skills necessary for professions where the determining factor is the activity of communication (training of the negotiation process, training for management personnel, training of partner communication).

According to researchers, among social work specialists, it is advisable to conduct such trainings as: creativity training, training of partner communication, sensitivity training, professional communication training, training of «self-confidence», trainings on improving individual psychological characteristics of the personality. Such trainings are aimed at the formation and development of skills, abilities, guidelines for effective communication, unlocking mental stress, removing psychological barriers.

Summarizing the above, we can note that participation in trainings plays an important role in the process of forming and developing ethical competence of social service workers.

**Conclusions.** Thus, the formation and development of professional moral and ethical qualities of social workers occurs thanks to methods of organizing and implementing educational and cognitive activities (lectures, seminars, practices, etc.), methods of stimulating and motivating learning (discussions, analysis of problem situations, etc.), the differentiation method that allows modeling student learning with an orientation to their personally chosen specialization, the integrative learning method, where special disciplines are offered in an integrating version («Social Psychology», «Social Pedagogy», «Psychological and Pedagogical Therapy»). Such learning conditions contribute to the process of socialization and social adaptation of students, their penetration into the essence of future professional activity, self-knowledge of how much each of them has a desire for social work.

In order to develop moral and ethical qualities and improve the quality of work, specialists use such forms of work as: practically-oriented seminars on current problems of social work, training sessions, group discussions, individual workshops, etc.

In the future, research on this topic can be devoted to studying the mechanisms of formation of moral and ethical qualities in future social workers and developing recommendations of a substantive and procedural nature to increase their level.

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## THEORY AND DEVELOPMENT OF POLITOLOGY

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### FEATURES OF MANIFESTATION OF POLITICAL LEGITIMACY IN CENTRAL EUROPEAN COUNTRIES

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**Abstract.** Understudied aspects of political legitimacy in the contexts of these CEE countries, especially the subjects of this paper, namely Hungary, Poland, East Germany (GDR), and the Czech Republic are investigated in this study. Many of them realized political democratization mainly due to pressure from international organizations such as the European Union and the Council of Europe. In Hungary, legitimacy under Viktor Orban Fidesz government entail electoral support and conservatism and anti-immigration policies albeit undermining the democratic institutional structure. The Polish state gains its mandate from free elections or Catholic culture and civil society but it contested by the recent amendments in the judiciary made by the ruling party, Law and Justice. The GDR was pursuing a Marxist-Leninist image and policed the people and their actions, hence when the economy deteriorated, people protests and desire for freedom made the GDR to collapse following the fall of the Berlin Wall in 1989. However, this has increased its democratic legitimacy after the 1989 regime with stable institutions, active civil societies, press and media freedom and EU member despite vices like corruption. This comparative investigation underlines the fact that historical, social and institutional backgrounds influence the recognition of governments in the countries of Central East Europe and concerns international interventions, the process of democratization, and internal social acceptances. Information sources include primary sources like historical documents, constitutions and international agreements; secondary sources such as academic books and articles as well as legal studies; statistical data comprising public opinion polls together with international reports.

**Key words:** legitimacy, Europe, government, political, human rights, state, Fidesz, Party, Post-Velvet Revolution.

**Introduction.** It is believed that the democratization process in Europe began to gain significant momentum after the Second World War. This democratization process is usually referred to as liberal and is often explained within the context of the Marshall Plan implemented by the United States in Western Europe, along with an anti-Soviet rhetoric. Some interpret this democratization as a kind of anti-communist inoculation. However, it cannot be claimed that this process was successfully carried out across the entire European continent. The reason for this is quite simple. After World War II, pro-communist regimes were established in Eastern Europe, forming a "mini-world" alternative to the ideology of liberal democracy supported primarily by the United States and the West.

**The purpose of the research** is based on the overall objective of the investigation concerning understudied aspects of political legitimacy in Central and Eastern Europe, with a focus on Hungary, Poland, East Germany (GDR), and the Czech Republic. It looks at historical, social, and institutional contexts that shape government recognition and legitimacy. It also examines democratization processes within international organizations such as the EU and Council of Europe, and assesses internal factors such as cultural values and civil society. Based on the comparative models of legitimacy, the effects of legal and economic systems are analyzed in this study for their impact on political stability. The purpose of this research is to provide recommendations for increasing credibility of government and to contribute toward a universal understanding of legitimacy across various political contexts.

**Literature review.** This literature review synthesizes critical works exploring political legitimacy in Central and Eastern European (CEE) countries, focusing on Hungary, Poland, East Germany (GDR), and the Czech Republic. Kerényi and Wang (2023) examine Hungary's governance during the COVID-19 pandemic, revealing how crisis management reinforced Viktor Orbán's centralization of power while exposing limitations in democratic structures. Complementing this, Szikra (2018) provides insights into Hungary's welfare policies under Orbán, emphasizing their role in consolidating political support among select groups. These studies highlight the interplay between governance practices and political legitimacy in Hungary. In Poland, Sas (2023) analyzes the nation's legitimacy derived from Catholic culture and free elections but notes the judiciary reforms under the Law and Justice (PiS) party as a source of domestic and international contestation. Similarly, She investigates electoral participation trends, indicating fluctuations influenced by political and societal shifts. Osewska, Stala, and Bochenek (2021) delve into the relationship between religion and national culture, underscoring its enduring impact on Poland's political framework.

Studies on the GDR, such as Gallinat (2015), explore the authoritarian state's reliance on surveillance and control, while Baylis (1986) contextualizes its economic strategies. The GDR's decline and the subsequent integration into a democratic Germany, as analyzed by the European Commission (2002), which evaluates Germany's post-reunification growth. For the Czech Republic, Havlíček and Lužný (2013) focus on the interplay between religion and state, while Weszkalnys (2010) examines transformations in Berlin's cultural and political spaces as a reflection of broader democratization trends. Transparency International (2021, 2023) provides data on corruption, highlighting challenges to governance credibility despite institutional advancements.

Bozóki (2016) and Fleck (2018) present overarching analyses of rising authoritarianism in Hungary and Poland, linking these trends to broader shifts in CEE political landscapes. This body of work collectively underscores the multifaceted nature of political legitimacy in CEE countries, shaped by historical legacies, governance practices, cultural influences, and international dynamics.

**Democratization and Legitimacy Challenges in Central and Eastern Europe after 1989.** The democratization process in Central and Eastern European countries coincided with the 1980s and 1990s, with the collapse of the Soviet Union considered a bifurcation point in this process. Symbolically, the starting point of these developments in this region of Europe is marked by the fall of the Berlin Wall in 1989. In general, it should be noted that at the end of the 1980s, revolutionary processes of various scales took place in Central and Eastern European countries, laying the foundation for deep socio-political and economic changes. Regardless of the scale and form, the main objectives of these revolutions in the mentioned countries were the dismantling of political and economic structures, recovery from socio-economic crises, restoration of universal mechanisms of development, abolition of totalitarian political regimes, restoration of human rights and freedoms, and the establishment of globally recognized democratic principles. Undoubtedly, the political processes in Central and Eastern European countries in the late 1980s served common objectives, although they manifested uniquely in each country. In much of the political literature, the transformations that occurred in Central and Eastern Europe are referred to as "velvet revolutions," largely because these processes, with the exception of Romania, were conducted peacefully.

The issue of legitimacy of political power emerged in Central and Eastern European countries immediately after the transformation of their political systems. In these countries aspiring to establish democratic regimes, there was a widespread adoption of constitutions modeled after the developed democracies of Western Europe (Piotr Uhma, 2023, p. 310-311). In a sense, the republican models of Western European countries became a model for democratic transformations in Central and Eastern Europe. Many experts studying this process view this transfer as technical. "These constitutions had proven their functionality and resilience and were capable of ensuring political stability. It was believed that if these constitutions could ensure legitimacy in countries with civil societies,

they could likely do so in any state aspiring to build such a society. In other words, there are certain constitutional values that exist in any democratic state governed by the rule of law, regardless of historical and cultural particularities.” Another factor that made democratization processes essential to ensure state legitimacy was the pressure from the international community. This primarily refers to the Council of Europe and the European Union. These organizations demanded that Central and Eastern European countries adopt specific constitutional standards as a prerequisite for integration into the European family” (Hartwig, 1999, p. 920). Because most of the countries in Central and Eastern Europe share similar political backgrounds, political legitimacy in the recent years has roughly the same phenotypes in most of these countries within the past century. However, the specifics of each country’s transition to democracy has left its specific signature on the political context including examples of legitimacy. For example, political legitimacy as a concept in Hungary would involve such components as history, culture, social and politics. In the context of modern Hungarian history, this question has provoked significant interest only within the past few decades in connection with shifts in the political situation in the country (Mark Pittaway, 2004).

**The political legitimacy of the Hungarian government.** In Hungary therefore, the source of political legitimacy can be explained as a product of a political support both internal and external electoral performance and international influence. Alone, the Fidesz government’s popularity can be seen with reference to the voter turnout; however, the government has been accused of undermining democratic principles. Some authors assume that the pattern of legitimacy in the future is to a significant extent determined by internal political factors and an external environment (András Bozóki, 2016). Fidesz Government has been dominant and enduring in the Hungary particularly after the year 2010. The Fidesz Party (Hungarian Civic Alliance) was formed in 1988 as an opposition ‘youth’ movement but change its image and operating style to reflect a more conservative and nationalist agenda its current leader Viktor Orbán deput that in the late 1990s. It assumed a more assertive position in Hungary’s politics since 2010 and has controlled all parliamentary seats since then (David Landry, 2014). Fidesz the ruling party gained parliament majority for the first time in 1998 but became victorious and formed government in 2010. In these elections the party was able to win a two thirds control in the parliament, this gave them a strong base. Since 2010, Fidesz has been controlling the government and enlarging its term of office; Its victory in the 2022 parliamentary elections gave it a fourth term. However, in 2022 elections the party once again secured a very good position with 54.13% of the vote (Foundation Robert Schuman & Helen Levy, 2010). Lately, the Fidesz government has managed several electoral campaigns, which equally boosted the party support. For the last five years, starting from 2010 to 2014, both Viktor Orbán, the PM of Hungary, and Fidesz have triumphed in every poll with a parliamentary absolute majority. Particularly these election campaigns assumed an exceptional significance for undergirding the political legitimacy of the Fidesz government. Their campaigns, as a rule, reflect the main tasks of the population and focus on the concept of national state and security, taking hold of both domestic and foreign circumstances (András Bozóki, 2016). Below is detailed information about Fidesz's most significant campaigns and their implementation methods: It is one of the first campaign centred on national identity and rejection of EU’s bureaucracy referred to as “Brussels.” Elections which was among the most successful for Fidesz was based on the campaign slogan about “national pride” in the context of the conflict with the EU. The ruling party of Viktor Orbán played on the EU’s idea as interlopers cluelessly undermining Hungary’s internal autonomy. The essence of the campaign was in calling the following three slogans: “Hungary has to remain Hungary; We don’t have to obey Brussels.” This campaign found much support among the rural and conservative to vote. It further provided hungarian voters with more reasons to turn their back on the EU and for Fidesz, it was popular with voters on the nationalist front. The great performance of Fidesz in the elections of 2018 and 2022 in particular represent the effectiveness of this approach (CIDOB Monographs, 2024).

The second one was a campaign against migration, which became the most extensive and effective campaign of Fidesz government. The government in 2015 mobilized force against border crossers and at the same time put out content in media indicating that migrants were a threat to ‘Hungary’s membership and safety’. In this regard, a number of government ads and billboards on migrants were launched within this campaign. The main activities of the campaign comprised of building walls along the borders, and trends in expressions of security. The Orbán government tried to stop the refugees by building walls along the borders of Serbia and Croatia. The government associated migrants with “terrorism” and “foreign threats,” thus putting this matter high on the agenda (Elżbieta & Goździak 2019). These messages especially awoke more conservative and nationalist electorate. They received a lot of votes thanks to this campaign; moreover, placing migration at the heart of the 2018 parliamentary election Fidesz made an excellent result. Although Hungarians have always had reservations about immigration, it was not as strong as in the 2010s, which consolidated the government.

The third major election campaign was family policy and support for traditional family values. The Fidesz government has begun using advertisement messages with regard to family policies to support traditional family models and national identity. The Orbán government launched some family assistance programmes for the families with children and the government undertook some measures to consider the economic status of the families through such programmes (Dorottya Szikra 2018, p.9). The government cut back the rights of the sexual minorities and passed laws against the rights of the LGBT. They found that this campaign was particularly effective with audiences in rural settings, and with those who could be considered more ‘traditionally minded’. Focus on family values ensured that Fidesz ensconced its conservative support base and boosted vote representation for the government’s populist agenda.

More recently, the campaigns have been on economic support in the period of the Covid-19 threat and rallying for the united states. In the light of the COVID-19 pandemic, the Fidesz government tried to bring the voters closer together and restore the trust in the government offering Kern and Horn financially. In this context, the government adopted different economic stimuli measures, actions for employment preservation, and even appeals with a logbook of unity and solidarity. Voters did not experience economic insecurity, and through controlling the pandemic and stating that people should support the government and be united, this message was sent to the public in terms of the government’s competence. It has kept up voters’ support (Ádám Kerényi & Weichen Wang 2023).

In conclusion, the aspects that made Fidesz victorious are accurate slogans, security and fear sense-words and last but not least topics as national sovereignty can be mentioned. Indeed, Fidesz has delivered very particularly tuned messages addressing the issues of the voters. These messages conveyed goal and value orientation that are conservative including national, security, and family. Usually the government used security, migration, and foreign interference as the major discussion items and tried to mobilize voters via fear. To strengthen nationalist feelings, Fidesz represented its fight against the European Union and the world as protection of populist sovereignty. This is how the campaigns all evolved to the point where premier Orbán’s Fidesz government rightfully overstepped the electoral threshold and thereby procured political legitimacy.

Fidesz has obtained the power legally and has performed effective campaigns to receive the votes of the people. Since 2010 economic policies, migration policies and overall approach emphasizing the importance of national sovereignty found the support among the population in the country. Based on the prior sections and the subsequent discussions, the government of Viktor Orbán and his Fidesz party are in the focus of severe criticism during the past years both at the national and international level for the authoritarianization processes they enacted and supported. The main reasons for these criticisms are as follows:

1. The Orbán government is charged with excessive regulation and limitation of operations by the independent media outlets. The Fidesz government since 2010 has made moves with the apparent



goal of controlling the media more at the central level and controlling more media outlets. These small independent news groups have been threatened and some media houses have either been bought by friendly businessmen to the government or closed down. This has considerably reduced the liberal degree of freedom of speech and public democratic debate. In total, it can be stated that controlling mass media is one of the biggest complaints regarding the Orbán government (Polyák Gábor, 2015).

2. Since the year 2010 the Fidesz government has initiated some drastic changes in the system of judiciary which has been considered by many as the government assuming full control of judiciary institutions. The year 2012 saw the introduction of a new constitution and with that new judges to the courts were either dismissed and replaced with individuals sympathetic to the government. This has led widely discuss the question of Hungary's legal system's sovereignty. These problems have been often raised by the European Union, and it has pointed out that the Hungarian authorities have effectively politicised the justice system (Fleck 2018). This constitutes what may be termed as augmentation of control over the judiciary.

3. Looking at it in terms of human rights, the Orbán government has recently introduced strict measures regarding the non-governmental organizations (NGOs). First of all, foreign funded NGOs have been hit by the so called "foreign agent" laws and, their activity, has been limited. This has affected the work of human rights defender and civil society organizations in a very big way.

4. The current government of Orbán has been on the epicenter of attention for its uncompromising position on the migration issue in Europe. In early 2015, the government has constructed barriers around the countries borders in order to try to halt refugee and migrant movements into the country. Using highly aggressive language towards the immigrants, the government justified the preservation of the 'sovereignty' within the EU even. However, such an approach has been denounced by human right non-governmental organizations and the international community (Elżbieta & Goździak, 2019).

5. The recent authoritarian shift in Hungary and attacks on the rule of law have attracted a lot of discontent among the EU. The Fidesz government bullying of the judiciary, pressure on the media and changes in legislation affecting NGOs are concerns voiced in the European Commission and the European Parliament. The European Union has also taken legal action against Hungary and it has threatened to demuse Hungary's financial support when necessary (Dr. Júlia Mink 2017, pp. 22-29).

Domestically, Fidesz and the Hungarian government headed by Viktor Orbán are also criticized. Democracy area of concern for the opposition political parties and civil society of the country emanates from the government's encroachment on democratic institutions to consolidate its powers, political pressure on independent media and judiciary. However, ideas, which define Orbán as the champion of national sovereignty, the enemy of "foreign interventions," meet great approval among people.

The first is approval from domestic sources and, second, the numbers obtained through the elections by the Fidesz government. Having the series of election and gaining high mandate matters enhance internal legitimacy of the Fidesz government. Since the year 2010, the party has scored a big win in every liberty it has entered into. In the parliamentary elections of 2022 Fidesz obtained 54.13% the votes and got 135 seats, thus it controls the majority of seats in the parliament (Fondation Robert Schuman & Helen Levy, 2010).

However, two factors could indicate how the political legitimacy for the Orbán government endures all pressures and criticism. First, his approach that is formally conservative – he has been focusing on national sovereignty, has been inveterately anti-immigrant, does not accept "interference" from the West – helped him to built a nationalist core vote (Gabor Halmai, 2018). It also assists Fidesz to justify its existence, so to speak, from occupying the dominant position in Hungary's political landscape this move aids in maintaining its credibility. The second one is the economic support factor. COVID-19 governmental financial assistance and social measures provided have stabilised voter confidence in the government, thus strengthening its legitimacy. In general, Fidesz's actions prompted pre-elec-



tion and post-election protests, and other displays of increased opposition that the government seeks to counter through reactionary policies, alongside anti-immigrant, nationalistic, and security rhetoric. This dynamic makes the position of Fidesz in the political system and government legitimacy rather vague.

**Foundations of political legitimacy in contemporary Poland.** In the context of Polish politics political legitimacy has to be defined and analyzed from historical, cultural, institutional and social perspective. This work reviewed selected aspects of the rule of law and assess the polity in Poland In line with the established expectation, Poland adopts the Constitution that spells out a structure of power and ensures that there is a system of check and balance which remains a critical factor in as far as political legitimacy is concerned. The rules and principles of the constitution created in the new law are supposed to enhance the citizens' confidence in state authorities.

In the current years, Poland has received criticisms within the international community and domestically for political controversies on judicial reforms driven by Law and Justice party. Such changes are viewed as endangering the existence of the judiciary's autonomy, raising questions about the legal status of some state officials. Nowadays Polish civil society is rather developed, and effectively engaged in political processes, political performances, and monitoring the elections. Free press and media is equally important in enhancing political legitimacy through passing information, promoting freedom of speech and debates and giving an opportunity for been used to question the structures of the government.

Credibility of governmental authorities in Poland is unprecedented in relation to the political processes in the country, traditions and the present state. Some of the forces are as follows: Basically, the following factors underlines the force that legitimise the Polish government. First of all, the first sign of political legitimacy in Poland – democracy within the sign is manifested through democratic election. Parliamentary as well as presidential elections established the voter turnout and contributed to the favourable role of the political parties after 1989. Free and fair elections enhance the legal credibility of the governments (Adriana Sas, 2023). Synchronously, Polish people have a great appreciation for political discourses associated with freedom and nation self-rule. Free state with a historical background discourages nationalism of the people. This, in turn, increases the government's popularity since people, ideally, support the idea of independence, do not approve of interference from outside. Secondly the religious and cultural aspects have maintained their influence on the political situation in modern Poland. In particular, Catholic Church sanctions political legitimacy in Poland as a force of progress (Elżbieta et al., 2021, p.8). Interference in the political affairs further creates legitimacy among the voters who hold a strong belong to the church. Furthermore, government's actions in social and economic liberalization help to legitimate states. Decreases in unemployment rates, economic growth and the enhancement of social security systems result in improved voter confidence in government enabling political balance (Jakub & Dušan 2013, pp. 195-196). In addition, social justice and the credibility or confidence in the working of the state are features of political acceptance. Less oligarchic and more transparent governance increases voter confidence and correspondingly the feelings of legitimacy (Ireneusz Pawel Karolewski & Maciej Wilga, 2018)

This paper analyzes the nature and dynamics of Polish political culture and the key historical events that have shaped it, striving to map the sources of the legitimacy of the current Polish government. The current governing Law and Justice Party (PiS) has continuously gained political triumphs since 2015, as they enjoy wide support via free elections. Poland especially has a distinctive national character shaped and put into historical memory by dynamic political fights for independence and tends to support governments focused on the nation's independence. The Polish Catholic Church is also very influential, it operates directly within the political process initiating policies that reflect tradition (Jakub Havlíček & Dušan Lužný, 2013, pp. 195-196). Economic liberalization, an emphasis on Peronist social programs has intended betterment of living standards and strengthened the gov-

ernment's domestic appeal. The involvement of Poland with the European Union makes it even more credible for promoting EU standards of the compliance while increasing the interest in economic and security collaboration. Political legitimacy is also anchored in membership in the European Union and the North Atlantic Treaty Organization. EU supports the standards of democratic governance and human rights, but also offers funds for economy that make the citizens to trust national institutions. Indeed, political legitimacy can be viewed as a concept that is not easy to define in the context of the Polish state and society as it is consistently changing depending on a wide range of internal and external factors.

**Factors undermining the legitimacy of the German Democratic Republic.** The government of the GDR strived for years to establish political as well as the economical foundation and at the same time lost its legitimacy due to any reasons. This process went much further than simply economic problems and social unrest; the external pressures, problems of governance and the internal contradictions of the system also led to the exacerbation of the crisis vital to the existence of the regime (Thomas, 1986, p.416).

First, the GDR relied on a planned economy, however the productivity encountered major challenges on the way. Subsidisation from the Soviet Union and restrictions in East – West – trade decreased in the course of the 1980s and thus the East German economy had come under pressure. They experienced severe scarcity of the most important life necessities and other necessities (Thomas, 1986 p.396). It intensified the disillusionment of people and caused the erosion of trust in governmental efficiency. According to some sources, even by mid 1980s, the requirements of most basic needs of the consumerist culture were not being fulfilled in the GDR. Besides, living conditions in East Germany seemed to be of a lower standard than West German, hence increasing social illiterate. People of East Germany understood severity of their situation and the living standard in West Germany through television broadcasts, especially if they lived close to the Berlin Wall. In combination with restrictive conditions, people lived everyday life that was entirely different from what they had known before – this brought injustice (Gisa, 2010, pp. 81-84). While those in the west received better paid job, more consumer goods and liberal policies the East German people were subjected to a closed planned economy.

The rational-legal legitimation of the GDR government suffered badly under its repressive political environment. Facilitated by widespread spying from the Ministry for State Security (Stasi), the government wielded unprecedented control over its citizens, at a cost of curtailing public freedom. (Anselma Gallinat, 2015, p.6) The oppressive surveillance established an atmosphere of political conditions where citizens believed their freedoms stripped; generating a devastating collapse in faith towards the government. This was an idea that resonated particularly strongly with younger people, thus making it possible to evoke yet more discontent (Gisa, 2010, pp. 81–84). It also revealed that the shelf-life of the repressive system was not sustainable due to this limitation in its legitimacy. And as the USSR curtailed its subsidies, making East Germany increasingly part of a stagnant high-cost environment mainly in defence and aerospace, GDR economic woes perpetuated. That co-dependency weakened economic security and narrowed the government's domestic-policy latitude. In the late 1980s, Soviet reforms under Mikhail Gorbachev (such as Perestroika) clashed with the authoritarian regime of East German President/Erich Honecker. Declining Soviet assistance also lessened the GDR's international standing. At the end of the 1980s, there were similar popular movements in the GDR. The 1989 protests, in particular, showed that the population had simply had enough of government. At mass protests and marches, such as a high official gathering in the heart of Berlin at Alexanderplatz demands were made for political change and reform (Gisa, 2010, p.8) The protests laid bare the rot within a political structure where declining government legitimacy could no longer repel pressure from citizen demands for freedom and reform; improvements in economic conditions. The crude rolling of its power and oppressive practices were completed with Berlin Wall crashing in

1989, destroying the legitimate basis for GDR government. This event finally marked the complete breakdown of control by the GDR government, on national and international scales. Il faut désormais accepter que les niveaux incompressibles de mécontentement populaire ont fait sauter le régime.

This all leads us to the conclusion that however many ways in which the GDR government tried to maintain its own legitimacy and stability, economic weakness, oppressive governance, international pressures, and social unrest made its long-run right of existence unfeasible. The failure of the government to solve issues in economic and political areas hand in hand with the repressive way people felt the restrictions in their everyday lives with grew resentment against the government. This process peaked with the falling of the Berlin Wall and was followed by an absolute collapse of government within in GDR. The mass protests, which started in Leipzig in the autumn of 1989 and spread to other cities, became a watershed moment in GDR history. These protests brought together different social forces with common demands, including freedom of movement, democratic reforms and better living standards. The organization and scale of these protests showed that society, as a whole, was done accepting faded status quo. This trajectory ended with the collapse of the Berlin Wall on 9 November 1989. This event was a symbol of the end of Germany's division and spoke to why reunification was on its way. As we know from the events of 1989-1990, a regime with the skimpiest ideological base, maintained through repressive means could not survive against the tide To begin with, the GDR's political legitimacy was based on a Marxist-Leninist foundation. The SED elite ruled under this doctrine. This was a political slogan only, for the government claimed to embody the will and wishes of the people but in fact this ideological stance allowed it to overlook dissenting voices and ensure compliance across society. The mention of repression, particularly via the line ministry – that is, using Stasi – came to be central. QR Code Link to This Post 2015 (Anselma, 2015, p.5) The Stasi put a system of horizontal surveillance in place, intervening heavily into the life-course of citizens. The government was unable to gain popular support and social discontent grew in this context. Secondly, the economy of GDR was based on planned economy but the economic situation in East Germany was really weak comparing to West Germany. But then the standards of living in GDR started to fall by the 1980s and shortages of consumer goods and a stagnant economy eroded faith in the future of East Germany. Statistical figures show that at the end of the 1980s, the growth rate of GDP in the GDR was about 1.5%, while this figure in West Germany stood at almost 3% (Directorate General for Economic and Financial Affairs, 2002). Daily issues of having food for the population accelerated this process, losing even more people to support for those in government. Third, the media provided clear images of West Germany's high living standards to GDR citizens. This made people feel like there was a division in the society. Frustration was especially high among locals on the exact opposite side of the Berlin Wall. In the West, there was freedom of travel, a higher income and economic opportunities; in the GDR there were fewer social freedoms with poor economic opportunities. This discontentment resulted in mass emigration. Around 300,000 people had escaped to West Germany before the fall of the Berlin Wall in 1989 (Maier, 1997 p.209).

Finally, mass protests in the GDR in 1989: this was an unmistakable sign of the population having had enough of their government. Citizens started protesting over freedom, development and democracy. Thousands took to the streets of Leipzig in October 1989, demanding the end of the regime and, ultimately, a way past the Berlin Wall. At the end of the day on 9 November, it was clear that the government had lost control and nothing could be done to reverse the mounting public discontent – this moment represented a watershed, heralding almost immediately into being everything foreseeable which would lead to the GDR government's collapse with the fall of Berlin Wall.

Thus it can be said that the GDR government gained its legitimacy through thin ideological means and authoritarian constriction. But what 1989-1990 showed was that such systems could not survive in the long run when faced with a combination of economic weakness and the desire of people to be free. While public frustration grew due to economic stagnation, abysmal living standards and

repression, the legitimacy of the regime being gone with December 1989 as expressing itself in style commensurate to its end, but after the fall of the Berlin Wall there was nothing to do—the government had lost all grounds for credibility. The fall of the GDR was due to not only internal processes, but also external relations in the wider world. The GDR ended when the country was reunified into one Germany.

**Building political legitimacy in the Czech Republic: post-velvet revolution developments and ongoing challenges.** For the Czech Republic, political legitimacy is one of the most important factors that help to explain the stability and operationalisation of its democratic order. After the Velvet Revolution in 1989, Czechoslovakia and later the Czech Republic, managed to construct democratic institutions and promote the rule of law quite effectively (LADISLAW RABUŠIČ, TOMÁŠ SIROVÁTKA, 1999, p. 240). However, the process of constructing politically legitimate institutions is still ongoing and has many challenges that need to be addressed.

One of the most crucial components of political legitimacy is the people's faith in that specific government and its bodies. Like a number of other Central and Eastern European nations, the Czech government's approval ratings are not always so positive. Corruption scandals and political crises have a tendency to undermine public trust towards state institutions (LADISLAW RABUŠIČ, TOMÁŠ SIROVÁTKA, 1999, p. 242). In recent times, the higher authorities have made more intense and vigorous attempts to address this issue through anti-corruption measures and improving the accountability of the government, but more remains to be done in this particular issue.

Also, in enhancing political legitimacy, the importance of civil sector activism and freedom of media is significant. Czech society has a sizeable civil sector in which many NGOs watch what the government does and promote the political participation of citizens. Media freedom, which has been experienced even under pressure from some politicians and business interests, is extensive in ensuring the availability of information to the public and fostering democratic engagement to the (Jan Wintr et al., 2016, p. 147). In addition, the Czech Republic's membership in the European Union has a significant impact on domestic politics and serves as an additional factor supporting political legitimacy. Commitment to democratic principles and adherence to strict EU standards help strengthen trust in Czech institutions both domestically and internationally. However, in order to further consolidate lasting legitimacy, systemic reforms, the provision of high democracy standards, and transparency in public administration are necessary. Political legitimacy in the Czech Republic is a crucial aspect of the country's democratic stability and the functioning of state institutions. Following the Velvet Revolution of 1989, Czechoslovakia transitioned from a communist regime to democracy, and after gaining independence in 1993, the Czech Republic began to establish a democratic governance system. The legitimacy of the government is supported by the public's trust in the government, the activity of civil society, and the country's international relations. These elements contribute to the sustainability of Czech democratic governance.

One of the key characteristics of political legitimacy in the Czech Republic is the stability of democratic institutions. The Czech parliamentary democracy model is based on the election of representatives in both houses (the Chamber of Deputies and the Senate). The activities of Parliament, the limited executive powers of the President, and government policies under the leadership of the Prime Minister form the foundation of democratic institutions. Since 1993, elections for both chambers have been held regularly, with voter turnout ranging from 60% to 70% (Jan Wintr et al., 2016, p. 147). Significant progress has been made in continuing democratic reforms and strengthening the rule of law. However, political instability at certain times weakens the public's trust in the government. For example, after the 2017 parliamentary elections, the government formation process was prolonged, and ultimately, Andrej Babiš, leader of the ANO party, was elected Prime Minister. Although this instability temporarily reduced trust in the government, the Czech Republic continued to uphold its commitment to democratic principles.



One of the most important aspects of political legitimacy is trust in the government. However, in the Czech Republic, corruption scandals are one of the key factors undermining this trust. For example, in 2021, Czech Prime Minister Andrej Babiš was linked to the "Pandora Papers" scandal (Scilla Alecci, 2021). This event led to significant public discontent, and as a result, Babiš lost in the 2021 parliamentary elections (Transparency International, 2021). Although steps have been taken to increase transparency and accountability in the fight against corruption, efforts to increase public trust in state institutions must continue. According to Transparency International, in 2022, the Czech Republic ranked 41st out of 180 countries in the Corruption Perception Index, which indicates that the country has made progress in the fight against corruption (Transparency International, 2023). However, this highlights the ongoing need for the Czech government to intensify its efforts to enhance transparency and reduce corruption. Civil society and media freedom play a major role in political legitimacy in the Czech Republic. Non-governmental organizations (NGOs) and civil society are actively involved in overseeing government actions and working to protect citizens' rights. Although the government has occasionally attempted to restrict civil society activities, citizen activism continues to strengthen the democratic system. Media freedom is widely accepted in the Czech Republic, and the level of press freedom is high. According to Reporters Without Borders, in 2023, the Czech Republic ranked 20th in the world press freedom index (Reporters Without Borders, 2023). This indicates that media freedom is an essential component of democracy, providing the public with the opportunity to access objective information about the government's activities. The Czech Republic's membership in the European Union (EU) is a significant factor for political legitimacy. Having joined the EU in 2004, the Czech Republic has further strengthened its democratic institutions by adhering to EU standards and laws. Commitment to EU principles of democracy and the rule of law enhances trust in state governance within the country. Monitoring by the European Commission and requirements for adherence to the rule of law help support the sustainability of the Czech political system. EU membership has also opened up vast opportunities for the Czech Republic in the economic sphere. The Czech Republic benefits from trade and investment exchange within the EU, and its GDP growth has ranged between 2-3% in recent years (Czech Statistical Office, 2024). This economic stability and growth also have a positive impact on the legitimacy of the government.

In conclusion, political legitimacy in the Czech Republic is based on the stability of democratic institutions, the activism of civil society, and public trust in the government. Although efforts to combat corruption and increase transparency are not fully resolved, they are key factors strengthening political legitimacy. Media freedom and EU membership also play an important role in reinforcing the legitimacy of the Czech government. However, ongoing reforms and the protection of democratic principles in state governance must remain a priority in the future. By strengthening its democratic institutions, the Czech Republic continues to take significant steps to enhance its legitimacy both domestically and internationally.

**Conclusions.** The article is devoted to the analysis of political legitimacy in the countries of Central and Eastern Europe. Like the majority of post-Soviet countries and first of all Azerbaijan, these countries have passed the transition period from administrative-emirate system to market economy, from totalitarian dictatorship to democratic management systems. In general, in the political discourse, the transformation of political systems in these countries occurs faster and more efficiently, so studying these examples of transition is of special interest. During the research, the political transit process of the specified countries is separately analyzed and the mechanisms of achieving the legitimacy of political institutions are explored. Manifestations of political legitimacy in each country are noted and characteristic features for the region are summarized at the end.



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## THE EMPIRE OF LIE: MEDIA-CONTROL AS A PILLAR OF PUTIN'S AUTHORITARIAN REGIME

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**Abstract.** In this article, the author examines the system of media-control in Russia built under Putin from the beginning of 2000s. It has helped consolidating and maintaining his authoritarian rule inside the country over years. It can also be claimed that the system of media control created within Russia had also an impact on Russia's foreign policy, and the Kremlin attempted to export it within the territory of the former Soviet Union. The key media outlets in Russia are controlled directly by the State or Putin's close allies -members of the so-called *sistema*. It creates the illusion of plurality and alternative thoughts, however, all of them are steered from one place – the Kremlin. Nevertheless, this system is strongly Putin-oriented and serves his interests; it will not cease to exist after his resignation. Its infrastructure, with a high degree of probability, will serve his successor too. Thus, the author asserts, the state of play could be changed only by destroying the informal system of power itself.

**Key words:** Russia's foreign policy, control, system, Putin, soft power, media outlets, power, influence.

**Introduction.** Russia under Putin showed a stunning metamorphosis: from a semi-democracy after Yeltsin rule to a fascist regime (Snyder, 2022). Despite the change of formal attributes of power, in the strict Weberian sense, the informal structure mostly remains the same.

There are a couple of ways to describe the nature of Russia under Putin. In his book *'Mafia State: How One Reporter Became An Enemy Of The Brutal New Russia'* (2011), British journalist Luke Harding asserts that Russia is a mafia state where government and organized crime are fused (Harding, L., 2012). The term 'mafia state' was coined by Aleksandr Litvinenko, former employee of the Russian Federal Security Services (FSB), prominent critic of Putin's regime who was killed presumably on his order (Luhn, A., Harding, L., 2016). In her turn, Alena Ledeneva, Professor of Politics and Society at the University College London, views Russian governance structure as a network, the system (*sistema*), emphasising its dependence on unwritten rules and reliance on informal practices (Ledeneva, 2011: 39). *Sistema* is hard to access; it exists through personal contacts and, as a result, leaves no trace or record (Ledeneva, 2011: 40). Its power rests upon principles of suspended punishment, compromise, mutual responsibility (*krugovaya poruka*), and the sustained vulnerability of individuals (Ledeneva, 2011: 41).

In her book *'Can Russia Modernise? Sistema, Power Networks and Informal Governance'* (2013) Alena Ledeneva defines *sistema* as a networked 'extension' of power concentrated on the top and channelled by networks. The latter are clustered around centres of power and recruit with caution (Ledeneva, 2013: 36). As a result, Putin's *sistema* could be examined through such 'ideal' types of power network as 'inner circle' of friends (sharing life); 'useful friends' (sharing leisure); 'core contacts' (sharing career); and 'mediated contacts' (sharing affiliation) (Ledeneva, 2013: 54). The latter category is important for Putin's presidency. It is used for ownership control over media in Russia. As Ledeneva put it, its name is not a coincidence, because Putin has been referred to as a 'media President' (*mediinyi*). 'Media and the Internet are crucial for Putin's 'managed democracy', media campaigns and media rule,' she says (Ledeneva, 2013: 81).

In her article *'Internet control through ownership: the case of Russia'* (2016), Swedish researcher Carolina Vendil Pallin asserts that the increasing control through the ownership of networks

becomes less visible and less obtrusive when it takes place within the sistema. ‘People who are part of the sistema institute control through ownership of Russian resources by buying a company, by an owner being recruited to the network, or by activating the sistema to deliver upon requests from Putin’s network,’ she says (Pallin, 2016: 3). Formally media outlets in Russia are owned by different subjects creating an illusion of plurality and a free market. However, they are all linked to one source.

Putin’s power network could also be viewed through the prism of ‘*Politburo*’, ‘*Kremlin towers*’ and the ‘*Planets*’ models. According to Russian political scientist Nikolay Petrov, the first model suggested by Evgenii Minchenko describes the main shareholders and managers of the system participating in the development of key decisions as in the Soviet times. The second one is the model of stable business-political clans suggested by Vladimir Pribylovsky. Its name derives from the Russian aphorism that ‘the Kremlin has many towers’ indicating heterogeneity of power. Thus, the last one depicts the elites through their relation to Putin -the center of the entire system. That model was suggested by Evgenii Gontmakher (Lipman, Petrova, 2012: 499).

According to these models, all media outlets belong to one group or another in Putin’s entourage, the most notorious and stable of which is *siloviki*. They position themselves differently, as instruments of inner political struggle. However, they function within the interests of the central authorities and their own to preserve the existing status quo and total control over the information field. The collapse of this system could lead to the collapse of the State, as it happened to the Soviet Union before.

In their work ‘*Spin Dictators: The Changing Face of Tyranny in the 21st Century*’ (2022), Russian economist Sergei Guriev and American political scientist Daniel Treisman argue that modern dictatorships rely on soft forms of control (spin) rather than hard ones (fear). According to the authors, it is a distinct, internally consistent approach, the key elements of which are manipulating the media, engineering popularity, faking democracy, limiting public violence, and opening up to the world (Guriev, Treisman, 2022:13). So contemporary autocrats such as Putin spare no resources to control the media because they help to cement their power presenting themselves as competent leaders. In order to fulfill this goal some sort of press freedom could exist because restrictions that are too blatant can backfire (Guriev, Treisman, 2022: 16).

In his book ‘*The Invention of Russia: From Gorbachev’s Freedom to Putin’s War*’ (2015), Arkady Ostrovsky, British journalist of a Russian dissent, argues that in Russia whoever controls the media also controls the country. That is why Vladimir Putin, who became the President of Russia with the help of TV, took control over it as soon as possible.

“It has been the main tool of his power, his magic wand that substituted a TV picture for reality. As Putin’s friend Silvio Berlusconi once said: ‘What is not on TV does not exist.’ Putin took it further: things that did not exist could be turned into reality by the power of television. This alchemical power was displayed vividly both in the annexation of Crimea and the war in Ukraine,” the author asserts (Ostrovsky, 2015:26).

American political scientist Joseph Nye defined soft power as the ability to influence others by attraction rather than by coercion or payment (Nye, 2022). In his article ‘*Soft Power*’ (1990), he stated that “when one country gets other countries to want what it wants-might be called co-optive or soft power in contrast with the hard or command power of ordering others to do what it wants” (Nye, 1990: 166). According to him, soft power comes primarily from three sources: its culture; its political values; and its policies. No doubt, as Joanna Szostek states, in international relations the mass media are closely associated with the concept of “soft power”. The term has been incorporated into Russian foreign policy. It is believed that favorable foreign media coverage can facilitate their foreign policy success (Szostek, 2014: 463). Thus, the media is a perfect tool not only to cement its influence at home but to expand it abroad.



The goals of this article are to draft history of acquiring control over media in Russia, describe the main media-holdings that control key media outlets and their relation to Putin, and to reflect on future prospects of their development.

The findings of the study. From the 2000s, Russia has been developing a special system of controlling the media. The state maintains a dominant position in the sphere with the main television channels and news agencies in its hands. The rest are controlled by Putin's close allies which creates the illusion of plurality and alternative thoughts (guided democracy). However, everyone is obliged to follow the same instructions as to what to highlight and what to avoid that are issued by the Kremlin (*temniki* which are secret instructions by the state officials on how to cover events). They are typically organized in the holdings – companies that possess more than one media asset. It is actually yet another manifestation of state capitalism in Russia.

The destruction of independent media outlets in Russia by the Kremlin is well-documented. It should be noted that at the beginning of 2000s the two main TV-channels, namely NTV and ORT, belonged to Vladimir Gusinsky and Boris Berezovsky respectively. They used these media outlets in their political affairs. For example, using these TV-channels in 1996 scandal-ridden election campaign helped Boris Yeltsyn to topple his main rival – leader of the Communist Party of the Russian Federation Gennadii Ziuganov – and to keep his presidential post (Harding, 2013).

As the new president, Vladimir Putin understood perfectly well the power of the media in the formation of public opinion and preservation of his power. Thus, the Kremlin began an attack on media outlets that were not under control.

Taking NTV, which belonged to oligarch Vladimir Gusinsky (through the Media-Most media group founded in 1993) over under government control in 2001 was a classical one. After numerous hints to change the editorial policy of the channel, its owner was accused of fraud and detained in Butyrka. After that, he emigrated from Russia and sold the channel and other media assets to Gazprom. It is known that Alexey Miller, long-time head of Gazprom, is one of Putin's closest associates. Alfred Koh, former Deputy Prime Minister and Head of the Federal Agency for State Property Management, who later will join the opposition, negotiated with him the merger as a top manager of the state-owned gas monopolist at that time. However, later on, Putin allowed Gusinsky to earn money in Russia after he renounced his claims to the media assets taken from him. Russian TV channels, primarily those owned by Gazprom-Media, purchased TV series produced by his companies for millions of dollars. According to Project media calculations, since 2000, he could earn from \$172 million to \$529.4 million thanks to the agreement with the Kremlin (Proekt, 2019).

Yevgeny Kiselov, Viktor Shenderovich (the author of TV show *Kukly* (Russian for “Puppets”), aired by NTV; that satirical TV show was particularly irritating for the authorities), Vladimir Karamura are among those who worked in NTV in 1990s and in the beginning of 2000s. However, they left after the change of ownership.

Another iconic media asset of Vladimir Gusinsky was Ekho Moskvyy radio station. It was founded in 1990, and since that time, for more than three decades, it was a mouthpiece for the liberal Russian opposition. It is worth noting that it was closed after the beginning of the full-scale invasion. Long-time editor-in-chief Aleksey Venediktov asserted that that decision was made by Sergey Kirienko, deputy head of AP for political issues (Venediktov, 2023).

However, ORT was and still is the most popular “button”. Owning ORT was crucial. Having ORT under control would mean having control over all the media. In turn, control over the media would mean control over the state.

Boris Berezovsky was the major shareholder of ORT, which later became One TV-Channel (Pervyi). He was one of the most influential oligarchs in the 1990s and a member of the “Family” (*semya*), inner circle of the former President Boris Yeltsyn. He got control over ORT in mid 90's and used it as the tool in his political struggle. The successful 1996 reelection campaign of Boris



Yeltsyn and the 2000 presidential campaign of Vladimir Putin are the most prominent examples of that struggle.

It so happened though that, soon after Putin became president, Berezovsky started playing against him using his key media asset. Some have said that the TV spot in the show of Sergey Dorenko, well-known Russian journalist of the 1990s, about the Kursk submarine disaster became the last straw. In that TV spot, Sergey Dorenko sharply criticized the authorities and personally Vladimir Putin for their inappropriate behavior during the rescue operation. He was immediately fired, and the Kremlin decided to take Pervyi under its control too (Meduza, 2019).

Berezovsky gave his share to his former younger partner Roman Abramovich and emigrated to the United Kingdom. Later on, Roman Abramovich who got on with Putin and became part of *sistema* transferred control over Pervyi TV channel to National Media Group owned by Yuriy Kovalchuk.

In the end of the day, the fate of these almighty oligarchs of the Yeltsin epoch was tragic. In 2013, Boris Berezovsky who experienced financial difficulties after the trial with Roman Abramovich committed suicide at his home in Ascot, Berkshire, UK (Cobain, 2014). His turn, in the beginning of 2025, Vladimir Gusinskiy announced that he lost his business and was in debts (Agentstvo, 2025).

Regardless of the form of ownership – state or private – top management of the main channels ought to take part in a regular media planning (*letuchki*) which are held in the Presidential Administration. In different years, they were conducted by Aleksandr Voloshyn (former head of AP), Mihail Lesin (former Minister of the Press), and Aleksei Gromov, long-term first deputy head of the Presidential Administration responsible for media. As the current boss of Dmitri Peskov, he has been serving in the AP under Putin longer than any other person. Except for media people, the meetings are attended by officials as well, for example, representatives of press-services. They would also directly supervise (*nadzirat'*) the major Russian newspapers, such as Kommersant, RBK, Komsomolskaya Pravda etc. (Proekt, 2019).

Putin's return to the Kremlin in 2012 and all the subsequent events, especially confrontation with the West and Russia's War in Ukraine (2014 -), changed dramatically Russian media market beyond recognition.

However, this is not the topic of our article, it is worth noting that numerous repressive laws were passed. Firstly, we should mention Russian foreign agent law which has been amended many times since it was first enacted in 2012. This repressive document has been targeting the media – organizations and individuals – in the first place. All materials produced or disseminated by them as 'foreign agents' should be specifically labeled as follows: "This material (information) has been produced, disseminated, and/or directed by a foreign agent (full name), or pertains to the activities of a foreign agent (full name)". The Russian Ministry of Justice maintains a dedicated register, which is filled in a completely opaque manner (OVD-Info, 2024). It should also be mentioned that the laws criminalizing the spread of "fakes" and "discreditation" of the Russian armed forces were passed soon after the beginning of the full-scale Russia's invasion of to Ukraine in 2022.

Secondly, in 2014, soon after the annexation of Crimea and the beginning of the war in Donbas, Putin signed a law limiting foreign investors' maximum share in the country's media outlets to 20% (Luhn, 2014). Initially, the law was targeting "Vedomosti" newspaper and Forbes magazine, popular media outlets with a significant share of foreign capital that cover serious economic and socio-political topics (Zhegulev, 2015). However, the law affected a wide variety of publications and led to redistribution of the Russian media market and its further monopolization.

Thirdly, immediately after the beginning of the full-scale invasion, almost all independent Russian media including Rain TV-Channel (Dozhd), the Echo of Moscow (Ekho Moskvyy) Radio and Novaya Gazeta, Meduza have been banned, blocked and/or declared "foreign agents" or "undesirable organizations" (Voronov, 2019). Some of them have continued operating outside the country trying to reach out their liberal audience inside Russia via such digital-channels as YouTube.

In order to limit their influence, the Russian government practically blocked them (Current Time, 2024) at the end of 2024.

Thus, as of the beginning of 2025, almost all large national and regional media outlets in Russia belong to a few holdings that are under direct government control, indirect control through state-owned companies, or in private hands that are closely tied to Putin: for example, Yuriy Kovalchuk who is a member of the so-called dacha cooperative Ozero (Populyarnaya politika, 2024).

He is believed to be Putin's closest friend. Thus, his name could be found in the sanction lists of various countries. He is the main shareholder of the Bank of Russia. It is widely rumored that he was the one to convince Putin to start the war with Ukraine (Zhegulev, 2023). He is also a co-owner of National Media Group. It owns, among others, Pervyi TV-Channel, REN TV, 5 channel and Izvestia. It also has a share in the VK group. It was founded in 2008, and currently positions itself as the biggest private media holding in Russia (NMG). Alina Kabaeva, who is considered to be Putin's wife, is the head of the holding board of directors. This flags Putin's personal position and attitude towards the company's activities. There was time when Mikhail Lesin consulted Yurii Kovalchuk (Surganova, Zhokhova).

The history of getting Izvestia under control is very illustrative too. It was the official newspaper of the Soviet State, and the Supreme Council in particular, between 1917 and 1991. Due to severe economic conditions after the collapse of the Soviet Union it was privatised by Vladimir Potanin, multibillionaire. In 2005, Izvestia was sold to the Russian state energy company Gazprom. Finally, in 2011, Gazprom sold it to the National Media Group (Vinokour, 2022).

Gazprom-media positions itself as the biggest media-holding in Russia. It was founded in 1998. The main owner of Gazprom-media is Gazprombank. Putin personally makes the most important personnel appointments there. As was mentioned above, it is the owner of NTV TV channel. After the beginning of Putin's third presidential term in 2012 and especially after the annexation of Crimea in 2014, Gazprom-media had been actively buying media-assets on the Russian market; including Friday (*Pyatnitsa*), 2x2, TV-3. In 2015, under Putin's order, Match TV was founded (Gazprom-Media Kholding). Tina Kandelaki became its first general producer. It has also been actively developing Rutube, video online-service whose significance has been growing after the ban of YouTube.

Kommersant Publishing House is yet another major privately owned media holding. From 1999 to 2006, it actually belonged to disgraced oligarch Boris Berezovsky and his partner Badri Patarkatsishvili. In 2006, they sold it to Alisher Usmanov. It publishes the Kommersant newspaper as well as other influential papers. He was put on the sanctions list after Russia's full-scale invasion. Usmanov rejected the allegations that he had bought it in the interests of the authorities.

All-Russian State Television and Radio Broadcasting Company (VGTRK) runs Rossiya, Rossiya24 and other TV channels (VGTRK). Oleg Dobrodeev is its long-term general director. Former head of NTV TV-company under disgraced oligarch Vladimir Gusinsky, he accepted Putin's proposal and took the helm of the state TV company with the largest coverage in the country. It was him who turned Russian TV into what it looks like today (Taroshchina, 2024).

Rossiia segodnia is another state-owned media holding. (RIA novosti, Sputnik, Ukraina.ru etc.). It originates from Sovinformburo founded in 1941. In its modern form, it was founded in 2013 (Rossiia segodnya). Dmitry Kiselyov, who threatened that Russia can turn the US to radioactive ash (Kelly, 2014), is the head of the said organization. Margarita Simonyan is its chief editor as well as of other state-controlled broadcaster RT (non-commercial organization TV Novosti, legal entity behind the propagandist TV channel RT). They are both on various sanctions list as Kremlin mouthpieces.

It is worth mentioning Grigory Berezkin's (Russian multimillioner, owner of ESN holding) media assets. He owns Komsomolskaya pravda, which is allegedly Putin's favorite newspaper, and RBK. The latter was sold to him in 2017 by Mikhail Prokhorov, billionaire and the former candidate President of the Russian Federation in 2011. The deal was purely political as the Kremlin was dissatisfied with

the coverage of public protests against corruption after the publication of Don't Call Him Dimon (On vam ne Dimon) film by Alexey Navalny team.

After the beginning of the Russian invasion, the businessman found himself in the EU, UK, and other countries' sanction lists as "Putin henchman". However, later he successfully managed to challenge that decision in the European Court of Justice because officials of the European Commission could not prove confirm his affiliation with Putin (Goryashko, 2023).

In recent years, another large media holding emerged on Russian media landscape – Patriot (RIA FAN, "Narodnye Novosti, Nevskie Novosti, Ekonomika Segodnya, and many others). It was associated with Evgeny Prigozhin, Russian oligarch and war criminal. After a failed rebellion against Russia's military leadership, it was dissolved. The Internet troll-factory that promoted Russia's interests on the Internet and interfered in the US elections was close to it too (Tsentr "Dosye", 2023).

### Main all-national media-holdings in Russia, 2025

Name	Main assets	Ownership
Gazprom-Media Holding	NTV, TNT	semi-state
National Media Group	Pervyi TV-Channel, REN TV, 5 channel, Izvestia	private
VGTRK	Rossiya, Rossiya 24	state
Rossiya segodnia	RIA novosti, Sputnik, Ukraina.ru	state

**Conclusions.** In 2000, Putin started his rule having established control over Russian television. His attack on the freedom of speech in Russia began when he forced Vladimir Gusinsky and Boris Berezovsky, being among biggest Russian tycoons of that time, to leave the country and to sell their media-assets. It ended up being what it is now – a propaganda machine which serves imperial ambitions of the Russian ruler. Russian key media outlets are controlled directly by the state or Putin's close allies, members of the so-called sistema. It creates the illusion of plurality and alternative thoughts, however, all of them are steered from one place, the Kremlin. It has helped consolidating and maintaining his authoritarian rule inside the country over years. It can also be claimed that the system of media control created within Russia had also an impact on Russia's foreign policy and the Kremlin attempted to export it within the territory of the former Soviet Union. Nevertheless, this system is strongly Putin-oriented and serves his interests; it will not cease to exist after his resignation. Its infrastructure, with a high degree of probability, will serve his successor too. Thus, the state of play could be changed only by destroying the informal system of power itself and power control mechanisms. This cannot be done overnight because of the sustainability of informal structures and inertia of the system. Any changes will not happen without serious upheavals. Therefore, they will need some personal courage from new charismatic leaders who are still about to appear on the forefront of Russian history.

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## THE ROLE OF INTERNATIONAL NON-GOVERNMENTAL ORGANIZATIONS IN RESPONSIBLE POLICY FORMATION IN THE EUROPEAN UNION STATES AND UKRAINE

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**Abstract.** International non-governmental organizations have a significant impact on the formation of responsible policies in the EU countries and Ukraine, contributing to the implementation of democratic standards, human rights and sustainable development. This article analyzes the role of international non-governmental organizations in supporting democratic reforms, protecting human rights and implementing transparency standards. Separately, the mechanisms through which international non-governmental organizations influence the work of state governments are considered, in particular through monitoring, advocacy and involving the public in decision-making processes. Particular attention is paid to the challenges faced by organizations in Ukraine, including insufficient financial support, political pressure and limited access to resources. The conclusion of the article emphasizes the importance of cooperation between international non-governmental organizations, states and international partners to achieve sustainable change. It is noted that strengthening the interaction of organizations with international donors and civil society is a promising direction for further research, which will contribute to a more effective implementation of their mission. Prospects for further research focus on studying the effectiveness of these organizations in complex political environments.

**Key words:** international non-governmental organizations, responsible policy, democratic reforms, human rights protection, advocacy, transparency, civil society.

**Introduction.** International non-governmental organizations (INGOs) play an important role in holding governments accountable by promoting democratic reforms, human rights protection and sustainable development. They have become important actors in policy-making either in the European Union (EU) or Ukraine. Their activities cover a wide range of areas, including human rights protection, environmental protection, social inclusion and democratic reforms. Their role in supporting democratization processes and the development of civil society in Ukraine, which seeks to integrate into European structures and adapt to international standards, is particularly important. Their activities are particularly relevant in the context of the European Union and Ukraine, which seek to improve the effectiveness of their policies, adapt to modern global challenges and comply with international standards. In EU countries, INGOs often act as partners with governments in the development and implementation of policy initiatives, while in Ukraine their activities often take the form of a struggle for transparency, the rule of law and the fight against corruption. Despite their significant potential, INGOs face a number of obstacles, including unstable funding, political pressure, and a lack of understanding of their role by society. Researching the impact of these organizations is relevant to understanding their contribution to responsible policymaking and identifying ways to improve their effectiveness.

The purpose of this study is to analyze the role of international non-governmental organizations in responsible policies formation in the European Union and Ukraine, identify the key challenges they face, and formulate recommendations for improving the effectiveness of their activities. The following tasks arise from the purpose of the study:

- to explore the main mechanisms of INGO influence on policy-making in the EU and Ukraine;
- to identify examples of successful cooperation between INGOs and state structures;

- to analyze the challenges faced by INGOs in Ukraine;
- to assess the role of international donors in supporting the activities of INGOs;
- to develop recommendations for strengthening interaction between INGOs, governments and civil society.

The study is based on the analysis of scientific publications, reports of international organizations and regulatory documents. The comparative analysis method was used to assess the specifics of INGO activities in the EU countries and Ukraine. In addition, an analysis of practical cases of successful interaction of INGOs with governments was conducted and the effectiveness of influence mechanisms was assessed. To identify challenges and problems, the method of content analysis of reports and interviews with representatives of INGOs in Ukraine was used.

Previous research suggests that INGOs are a powerful tool for democratization and human rights protection in Europe. In EU countries, they work closely with governments on sustainable initiatives such as environmental protection, social inclusion and transparency. At the same time, in Ukraine, their activities are often limited by insufficient funding, difficulties in communicating with state authorities and political pressure. Anti-corruption initiatives that attract support from international donors are successful cases. However, research indicates the need to develop clearer mechanisms for interaction between INGOs, governments and civil society, which requires further study.

**Presentation of the main material.** International non-governmental organizations (INGOs) in the European Union (EU) countries are actively involved in decision-making processes, providing expert assessments and recommendations. They participate in public consultations, organize awareness-raising campaigns and monitor the implementation of policies. International NGOs are important players in the European Union's decision-making system. Their participation is based on the principles of democracy and transparency. According to a study by the European Commission (European Commission, 2022), more than 70% of EU civil society organizations are involved in policy consultations in the areas of ecology, human rights protection, economic development and social inclusion. This includes participating in the development of regulatory acts, making proposals for changes to legislation and implementing recommendations on sustainable development strategies (State of the Union, 2022: 32). For example, organizations such as Amnesty International or Greenpeace have become key partners in shaping policies on human rights and environmental protection.

International NGOs have become important players in EU policy-making due to their ability to gather public opinion, provide expertise and lobby for civil society interests. Their activities cover a wide range of areas: from the protection of human rights to environmental initiatives. According to a report by the European Commission (2022), over 60% of new regulatory acts in the EU undergo a consultation phase with the participation of INGOs. For example, in 2020, organizations working in the field of social inclusion contributed to the development of the European Action Plan against Poverty (European Commission Report, 2022: 61). This interaction was made possible by the creation of public debate platforms, such as the European Economic and Social Committee (EESC), which allow civil society to influence the decisions of European institutions.

One of the most successful areas of activity of INGOs is environmental protection. Organizations such as The World Wide Fund for Nature and Friends of the Earth actively promote initiatives to reduce carbon emissions, reduce plastic consumption and preserve biodiversity. Their participation in the implementation of the European Green Deal ensured the inclusion of public interests in this strategic document. For example, thanks to their campaigns, the governments of EU member states committed to achieving climate neutrality by 2050 (Kytsiuk, 2023: 4). INGOs also monitor the implementation of environmental regulations by EU member states, regularly publishing reports on violations.

Environmental policy is one of the most visible examples of successful INGO influence in the EU. Greenpeace and Friends of the Earth have been active participants in the development and monitoring of the implementation of the European Green Deal. Their initiatives have helped to strengthen envi-

ronmental regulations to reduce greenhouse gas emissions, develop renewable energy sources and reduce plastic pollution. For example, campaigns against the use of single-use plastics in 2019 led to the adoption of an EU directive banning certain types of plastic products (European Green Deal, 2019, 31). In addition, environmental INGOs regularly monitor the implementation of environmental commitments by EU member states' governments, providing the public with reports on the real state of affairs.

For example, in 2020, Greenpeace launched a campaign criticizing the Nord Stream 2 project, highlighting the environmental threats. Their pressure contributed to the imposition of sanctions by the EU and a partial revision of the project. In addition, environmental INGOs are involved in the implementation of initiatives such as the LIFE program (development of eco-innovation). They provide technical expertise and help Member States integrate environmental standards into national strategies (Communication from The Commission, 2020, 11). In 2021, thanks to the efforts of Friends of the Earth Europe, several countries revised their deforestation plans aimed at preserving biodiversity.

INGOs in the European Union countries play a significant role as intermediaries between governments, international structures and the public. Their influence is based on the ability to mobilize resources, knowledge and public support to achieve goals. In particular, in the field of social policy, organizations such as Oxfam or Caritas Europe conduct an analysis of the consequences of economic reforms, focusing on supporting vulnerable groups. According to the European Economic and Social Committee (2021), INGOs provide 20-25% of expert support in the development of social programs at the EU level (Annual activity report, 2021: 14).

INGOs also advocate through grassroots campaigns and public consultations. In 2019, Climate Action Network Europe collected over 1 million signatures on a petition to the European Parliament demanding stronger climate targets under the Paris Agreement. This was an example of the successful use of direct democracy mechanisms to influence policy-making.

In Ukraine, INGOs actively cooperate with state authorities, contributing to the implementation of reforms and increasing transparency. They participate in the development of legislation, provide expert opinions and organize public discussions. For example, human rights organizations actively influence legislative initiatives in this area. International non-governmental organizations in Ukraine often act as partners for authorities, helping to implement reforms. For example, the United Nations Development Program (UNDP), through its local offices, actively supports decentralization reforms, promotes the improvement of e-government mechanisms and raises citizens' awareness of democratic rights. Success in this cooperation is observed in the implementation of electronic services, such as the "Prozorro" system, which ensures transparency in public procurement. However, there are problems in this interaction, including insufficient integration of local communities into decision-making processes (Balan, 2021: 17).

In Ukraine, the role of INGOs has grown significantly in the last decade, especially after the Revolution of Dignity. Organizations such as the Center for Civil Liberties have been working closely with government agencies to implement democratic reforms. In particular, in 2021, INGOs participated in the development of a draft law on increasing the transparency of political party financing, which was initiated with the support of the Council of Europe. INGOs also work at the regional level, helping local communities implement decentralization initiatives. For example, the USAID DOBRE program helped build the capacity of local governments in 75 communities by developing development strategies and attracting international resources.

One example of successful cooperation is the work of anti-corruption organizations, which, together with state bodies, develop and implement strategies to combat corruption. This includes monitoring the activities of officials, organizing public hearings and raising awareness among citizens about corruption risks. Among the successful examples are projects to support decentralization reform, which were implemented with the support of INGOs. These projects included training for representatives of

local communities, financing infrastructure development and creating regional platforms for dialogue with the government.

In 2022, in the context of the war in Ukraine, international INGOs, such as the Norwegian Refugee Council and the International Rescue Committee, together with the government, organized support programs for internally displaced persons. Their activities include financial assistance, the establishment of accommodation centers, and the provision of legal support. International non-governmental organizations specializing in human rights play an important role in monitoring and combating violations. Amnesty International, Human Rights Watch, and the Ukrainian Helsinki Human Rights Union are examples of organizations that actively document violations, especially in the conflict zone in Donbas. Their reports have become an important source of evidence for international legal processes, such as hearings at the International Criminal Court.

Human rights protection is one of the key areas of activity of INGOs. In the context of Russian aggression against Ukraine, organizations such as Human Rights Watch and the Ukrainian Helsinki Union have become important witnesses in documenting war crimes. For example, in 2022, reports were published on violations of the rights of the civilian population in Bucha and Mariupol, which became the basis for international investigations. The Ukrainian Helsinki Union for Human Rights (UHHRU) and Human Rights Watch document violations of the rights of the civilian population, including cases of torture, unlawful detention and disappearances. In 2022, after the start of full-scale Russian aggression, INGO reports became an important source of evidence for international courts (Tchobo, 2022: 14). For example, the Truth Hounds organization records war crimes in the occupied territories, and Amnesty International works to protect the rights of vulnerable groups, including children and women who have become victims of the conflict.

These organizations also conduct advocacy activities aimed at improving conditions of detention and access to legal aid. In cooperation with the Council of Europe, INGOs in Ukraine are developing programs to improve conditions in the penitentiary system.

The main challenges for INGOs in Ukraine are insufficient funding, political pressure, and limited access to resources. These factors make it difficult to effectively implement their programs and initiatives. For example, organizations involved in the fight against corruption face resistance from certain state structures.

Despite their significant potential, most Ukrainian INGOs face funding challenges. In most cases, their projects depend on grants from international donors, such as USAID, the European Union, or Scandinavian governments. According to a study by the Renaissance Foundation (2022), only 15% of Ukrainian organizations have stable sources of funding. According to the same study, over 70% of organizations depend on international donors, such as USAID, GIZ, or the EU (IRF Report, 2022: 31). This poses risks to the long-term sustainability of their projects, as donors often change their priorities or reduce funding due to political or economic circumstances. There is also a problem with the distribution of funds, as some donors favor large international INGOs, leaving local organizations without the necessary support. For example, in 2021, several regional organizations working in the field of IDP (internally displaced persons) rights protection were forced to reduce their programs due to lack of funds. At the same time, Ukrainian INGOs often have limited access to state funding due to insufficient legislative regulation in this area. This negatively affects the ability of INGOs to fulfill their function as a “watchdog” of state authorities and provide independent monitoring.

In the context of political instability in Ukraine, INGOs often face pressure from state structures. According to a study by the Center for Democracy and Rule of Law (2022), in 35% of cases, organizations working to combat corruption face discrediting campaigns in the media or direct threats. Political pressure on INGOs is one of the main threats to their independence. As Transparency International Ukraine (2023) notes, some government officials are trying to restrict the activities of organizations working on transparency and accountability issues. In 2021, the Verkhovna Rada con-



sidered a draft law that would have strengthened financial control over INGOs, which has drawn criticism from the international community. Political pressure is one of the main challenges for INGOs in Ukraine. Organizations working on anti-corruption, transparency, and justice issues often face discrediting campaigns in the media or direct interference from the government. For example, the Anti-Corruption Center has repeatedly stated that inspections by regulatory bodies were selective (Pressure on anti-corruption officers or political struggle – expert commentary, 2017). In 2021, a draft law requiring additional reporting for INGOs drew significant criticism from the EU and OSCE for attempting to limit the independence of civil society. Political pressure significantly complicates the work of organizations, reducing trust in them among the population and creating a negative information background. Also, according to the Ukrainian Institute for the Future (2022), some media outlets use manipulation to discredit anti-corruption initiatives funded by international donors. This creates additional challenges for organizations trying to protect public interests (Programs of the Ukrainian Institute for the Future, 2022).

One of the most important areas of INGO activity is the fight against corruption. Organizations such as Transparency International Ukraine and the Anti-Corruption Action Centre contribute to the development of anti-corruption legislation, the introduction of independent bodies such as the National Anti-Corruption Bureau of Ukraine (NABU), and increasing the transparency of state structures. Their initiatives have helped reduce corruption risks in the public procurement system. The fight against corruption is one of the priority areas of INGO activity in Ukraine. They play a key role in monitoring corruption schemes, proposing anti-corruption laws, and promoting open data. For example, in 2016, it was thanks to the efforts of INGOs that an electronic declaration platform was launched, which allows checking the property status of officials. At the same time, the DOZORRO organization created a network of public monitors who track violations in public procurement. Thanks to these initiatives, the level of public trust in anti-corruption bodies, such as NABU, has increased by 25% over the past five years. In addition, organizations are developing training programs for civil servants aimed at improving ethics at work. The success of these initiatives is confirmed by a USAID report (2022), which states that the level of trust in NABU among citizens has increased by 25% over the past three years (Viktorchuk, 2023: 143).

An important part of INGOs' activities is working with the media to raise public awareness. Advocacy campaigns organized by international organizations such as Freedom House actively promote the issues of freedom of speech and media independence. For example, such campaigns have achieved the repeal of laws that could restrict the activities of journalists.

At the regional level, INGOs play an important role in developing local self-government and engaging citizens in decision-making. The USAID DOBRE program, implemented with the support of local INGOs, contributed to the development of sustainable development strategies for over 100 communities. In 2021, a number of civil society organizations, as part of the "U-LEAD with Europe" initiative, conducted trainings for local leaders, which improved the management competencies of over 300 representatives of territorial communities in Ukraine.

INGOs in Ukraine actively cooperate with international organizations such as UNDP, UNICEF and OSCE to implement joint projects in the fields of education, medicine, environment and justice. For example, the UNDP project "Recovery and Peacebuilding" helps communities affected by conflict to rebuild infrastructure and create opportunities for economic growth. At the same time, international partners contribute to strengthening the capacity of Ukrainian INGOs through training, exchange of experience and funding of new initiatives.

**Conclusions.** International non-governmental organizations play an important role in shaping responsible policies in both the European Union and Ukraine. Their activities cover a wide range of areas, including democratization, human rights protection, the fight against corruption, support for social reforms, and environmental protection. In EU countries, INGOs have a significant impact on

decision-making processes due to their expert support, advocacy campaigns, and ability to mobilize public opinion. In Ukraine, their influence is somewhat limited due to political pressure, unstable funding, and the lack of clear mechanisms for cooperation with state structures. Despite this, examples of successful initiatives, such as the introduction of anti-corruption mechanisms or support for the rights of internally displaced persons, indicate the high effectiveness of INGOs in addressing critical issues.

In the context of the European Union, INGOs are a powerful tool for democratic participation of citizens in policy-making. They provide a platform for public dialogue, promote transparency of governments and accountability of politicians. Their contribution to the implementation of the European Green Deal, the fight against climate change and the preservation of biodiversity attracts particular attention. However, even in EU countries, INGOs face problems related to threats to independence, lack of funding or underestimation of their role by national governments. This underlines the need for further development of international partnerships, improvement of regulatory and legal mechanisms for supporting organizations and raising public awareness of their activities.

In Ukraine, where democratic processes are still in their infancy, the role of INGOs is particularly important. They act as catalysts for reform, a source of knowledge, and mechanisms for monitoring compliance with international standards. However, challenges related to financial dependence on donors, political pressure, and limited access to state resources constrain their potential. To ensure the sustainable development of civil society in Ukraine, it is important to create an enabling environment for INGOs: introduce transparent state funding mechanisms, strengthen protection of organizations from political pressure, and encourage their cooperation with local communities.

Thus, the further development of INGOs depends on their ability to adapt to modern challenges, effectively use available resources and expand their role as independent actors of civil society. Their success in the EU and in Ukraine demonstrates that civic activism can influence policy-making, change society and ensure responsible governance. Further research should be aimed at studying the effectiveness of INGO activities in different regions and developing new strategies to strengthen their role in the modern world.

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## PECULIARITIES OF PSYCHOLOGICAL INFLUENCE AND MANIPULATION IN SOCIAL NETWORKS ON THE FORMATION OF POLITICAL DISCOURSE

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**Abstract.** The article explores the peculiarities of psychological influence and manipulation in social media on the formation of political discourse. The authors analyse the main methods of manipulation, including targeting, personalisation of content, the use of fake news and information bubbles, and their impact on public opinion. The article uses dialectical and comparative legal methods, as well as case studies to achieve its results. The article discusses in detail examples of political manipulation, in particular during the Russian-Ukrainian war, and suggests ways to neutralise these influences through the development of media literacy, the use of technology to detect fake news and strengthening media accountability. The findings contribute to the development of strategies to counter manipulation in the digital environment.

**Key words:** disinformation, media literacy, case study, narrative, information bubble, fake news.

**Introduction.** The modern development of information technologies and social media has significantly transformed political discourse, making it accessible and at the same time vulnerable to manipulative influence. Social media, as an important communication tool, allows for the rapid dissemination of political messages, shaping public opinion and mobilising society to participate in socio-political processes. At the same time, the active use of these platforms creates risks of manipulation, spreading disinformation and artificially creating public sentiment. This is especially relevant in the context of democratic processes, where social media play the role of not only a communication platform but also a tool for psychological influence on citizens.

The issue of psychological influence and manipulation on social media becomes particularly acute in times of political instability, election campaigns or social crises. Targeted advertising, platform algorithms, the creation of information bubbles and the use of emotional triggers make it much easier to manipulate the opinions of certain groups of people. This can lead to polarisation of society, distortion of democratic processes and threats to national security. Therefore, studying the specifics of such influences is becoming an urgent task that allows not only to identify the mechanisms of manipulation, but also to develop effective tools to minimise them.

The topic is also important because social media is an environment where each user can be both a consumer and a disseminator of information, often without proper fact-checking or critical analysis. This creates favourable conditions for the spread of fake news, propaganda narratives and psychological influence on large audiences. In this context, research aimed at studying manipulation tech-



nologies, their impact on shaping political discourse, and developing methods to counteract such influences is of particular importance.

**Analysis of the latest research and publications on this topic.** The issue of psychological influence and manipulation in social media is the subject of numerous scientific studies that cover interdisciplinary approaches, including psychology, political science, sociology and information technology. Speaking about the latest significant studies on this issue, we should mention the works of E. Mamontova, who examines the peculiarities of public analytics as a phenomenon of media discourse (Mamontova, 2023).

Also worth mentioning are J. Zielinski, J. Theoharis, F. Pradel, M. Tulin, C. de Vrese, T. Alberg, A. Zeusner, and others. In their works, they emphasise the vulnerability of citizens of democratic countries to psychological influence through social media, especially when such platforms are used by authoritarian regimes (Zilinsky & Theocharis et al, 2024). At the same time, they note that the recipients of manipulative information tend to approve or reject conspiracy narratives, depending on their personal beliefs.

It is also worth noting that the study by M. Navalna and N. Kostusiak focuses on the cultural aspect of information warfare (Navalna & Kostusiak, 2023: 73). The authors emphasise that Russian propaganda is trying to discredit Ukrainian identity by promoting the thesis that it was created by the communist government.

An important study on the topic is the work of N. Mikava and I. Potapova (Mikava & Potapova, 2024: 122), which analyses in depth the political discourse, the role of modern technologies in it, and the importance of social media as a tool for shaping this discourse.

It should be noted that Y. Nikolaets focuses on the influence of the media on the formation of regional identity, especially for residents of Donbas, which, due to the active use of the media, has become a symbol of regional uniqueness (Nikolaets, 2018: 88). According to the researcher, the formation of political discourse was accompanied by the intensification of interethnic conflicts caused by the specifics of economic relations.

Despite a significant number of scientific studies on psychological influence and manipulation in social media, many aspects of this topic remain insufficiently studied. In particular, the issues of the complex impact of manipulative technologies on the formation of political discourse, the specifics of the impact on different social groups, as well as the effectiveness of modern methods of counteracting such phenomena require further analysis. In addition, the dynamic development of digital platforms and the emergence of new technologies create new challenges that require the adaptation of scientific approaches. All of this makes our work aimed at a deeper and more detailed analysis of this multifaceted problem relevant.

**The purpose of the article.** The purpose of the article is to study the peculiarities of psychological influence and manipulation in social media on the formation of political discourse, to identify the main mechanisms and to analyse real cases in order to substantiate effective approaches to minimising manipulation and increasing the level of information security in a modern democratic society.

**Methodology statement.** The methodological basis of the study was formed by general scientific methods of cognition, which provided a comprehensive approach to the study of the peculiarities of psychological influence and manipulation in social networks on the formation of political discourse. The application of the dialectical method allowed to analyse the dynamics of changes in the socio-political environment under the influence of digital technologies.

The comparative-historical method was used to study the transformation of manipulative technologies in political communications, taking into account changes in the information environment, in particular the transition from traditional media to social networks. The systemic-structural approach provided an opportunity to consider psychological influence as a multicomponent process that includes cognitive, emotional and social aspects.

The empirical analysis was used to study specific examples of manipulative social media campaigns and their impact on public opinion and political behaviour. Content analysis methods allowed us to study the nature and peculiarities of manipulative content distribution. The application of these methods contributed to the formulation of reasonable conclusions and recommendations for minimising manipulation on social media.

**Main part.** In today's world, and especially in Ukraine, which is in a state of full-scale war, tools of manipulation and psychological influence have become a powerful weapon in information and political confrontations. Rapidly developing social media have become a battlefield where public sentiment is shaped, citizens are mobilised, disinformation is spread and trust in state institutions is undermined. In such circumstances, studying the mechanisms of influence and manipulation becomes important not only to understand their essence, but also to develop effective methods of counteraction. However, for a qualitative analysis of these phenomena, it is necessary to first explain what exactly constitutes psychological influence and manipulation.

Manipulation is defined as 'a complex action performed with the hands, which requires skill and ability; it is also a procedure, an operation'. In addition, the term is also used to mean fraud or fraudulent activity.

Manipulating public opinion for political and commercial purposes has become an important tool in politics and market competition, although the ethical aspects of this phenomenon raise many questions. A well-known researcher E. Berneis noted that 'conscious and rational manipulation of the masses through their habits and beliefs is an important component of a democratic society'. Thus, he emphasised that manipulation is characteristic not only of totalitarian regimes, but also of democracies (Berneis, 2023).

Political manipulation is the use of covert communication strategies to realise political interests. As A. Konet correctly notes: 'Unlike other methods of influence, political manipulation is aimed at a mass audience and aims to shift public opinion or behaviour in the desired direction' (Konet, 2020: 187). Manipulations are usually carried out through the media, which allows them to reach the widest possible audience. Thus, the media become a tool that not only establishes contact with people, but also makes it possible to influence their emotions, beliefs and worldview.

At the same time, psychological influence is a complex process that includes a variety of methods and techniques aimed at changing the mind, emotions, beliefs or behaviour of a person or group of people. Such influence can be conscious or unconscious, positive or negative, depending on the purpose of the person who exercises it. In today's world, particularly in times of war, psychological influence often takes the form of information campaigns aimed at shaping public opinion, mobilising society or demoralising the enemy (Mamontova, 2023: 139).

It is worth emphasising that both manipulation and psychological influence are components of psychological communication, which determines how individuals identify with certain political groups and how this affiliation affects their political beliefs and actions (Shapovalova, 2024: 1333).

Having considered the basic definitions, let's move on to the direct analysis of manipulation and psychological influence on social media. Currently, there is no stable list of functions and methods of influence, as the interpretation of this phenomenon depends on the specifics of the socio-political context of each country and changes depending on the development of information technology.

At the same time, there are basic approaches and categories that allow us to characterise this phenomenon. In particular, in our study, we highlight the following important aspects of social media influence: targeting, personalisation of content, use of emotional triggers, fake news, use of AI and formation of information bubbles.

For a more detailed analysis and clearer visualisation of these phenomena, we plan to focus on specific cases, both in the international context and within Ukraine. The choice of this approach is

based on methodological principles, in particular, systemic analysis, which allows us to study social networks as complex communication systems with numerous interacting elements.

We would like to emphasise that the use of case studies allows for a detailed examination of practical examples of manipulation and psychological influence that reflect real-life situations in political, social and cultural contexts. Given the dynamic development of Internet technologies and media platforms, this approach allows us to cover a wide range of situations where manipulation through social media can be both negative and strategically used to influence public opinion.

In our further research, we will focus on analysing specific cases that illustrate the effectiveness of manipulative technologies on social media. In addition, we take into account the importance of studying not only the impact, but also the ways to neutralise these manipulations, which is important for the development of a strategy for media literacy and critical thinking among social media users.

And we should start with targeting and personalisation of content. One of the main features of manipulation on social media is the ability to fine-tune targeting, i.e., to direct content to a specific audience. Social media algorithms, such as Facebook, Instagram, Twitter, allow users to choose not only their age, place of residence or interests, but also their political position, behavioural patterns, habits and even emotional state. This allows certain politicians, parties, and even countries to target their messages more precisely and elicit the desired response.

The first example of such successful targeting was the US presidential campaign in 2016. As it became known, Cambridge Analytica used huge amounts of Facebook user data to create micro-targeted political campaigns. According to research, these campaigns actively used psychological profiling to influence voters' emotions and convince them to vote for a particular candidate. Targeting technologies allowed voters to see ads that exactly matched their political preferences, which significantly increased the chances of manipulators achieving the desired result.

Moreover, this case continued in 2024, as according to Goodway media (Monse, 2023), political campaigns invested heavily in data analytics and machine learning to improve their targeting strategies. The importance and comprehensiveness of this approach is clearly evident in Vivvix's analysis, which notes that political advertising spending is likely to reach \$11 billion in 2024, making it one of the fastest growing sectors of advertising (Passwaiter, 2023).

In our opinion, personalisation is being actively used to manipulate voters' emotions through content that resonates with their personal experiences or views. For example, political campaigns can tailor messages to increase feelings of fear, anger, or indignation among voters who, according to algorithms, already have certain emotional reactions to previous content. This creates a vicious circle effect, where people see information over and over again that reinforces their views and emotions.

An example of this is the presidential race in Ukraine in 2019, when candidates P. Poroshenko and V. Zelensky actively used personalised ads to achieve results in the parliamentary elections. Advertising campaigns on Facebook and Instagram were tailored to appeal to specific groups of people – voters who already had a strong preference for certain political leaders.

And considering the case of the Ukrainian elections, let's move on to the next feature of the manipulative influence of social media, namely emotional triggers. Manipulation on social media is often implemented through the use of emotional triggers, which are intended to evoke strong emotional reactions. These can be fear, anger, anxiety, compassion, or joy. In political campaigns, emotional manipulation is used to mobilise the electorate, mobilise protest moods or create conditions for social instability.

The presidential campaign of Volodymyr Zelenskyy is perhaps the most successful example of how social media can be used to gain extraordinary voter affection. The digital strategy of the campaign was carefully designed and aimed at engaging voters, particularly the younger generation, through social media. V. Zelenskyy's team actively used platforms such as Facebook, Instagram and YouTube to create viral content that combined humour, accessibility and a sense of unity among

the audience. The candidate's team constantly produced videos, posts, or collections of 'interesting facts' that highlighted V. Zelenskyy's personality and political messages, making them relatable and understandable to a wide audience (Zakharchenko, 2019).

It is worth noting that V. Zelenskyy's campaign successfully used the rhetoric of 'anti-establishment', which resonated with Ukrainian voters who were disillusioned with the old political elites. He has been vocal in his criticism of the ruling politicians, particularly the Poroshenko administration, focusing on corruption, inefficiency and the inability to implement necessary reforms. V. Zelenskyy has often highlighted the gap between politicians and the needs of ordinary citizens, which has further deepened public discontent.

Thus, his campaign slogan 'I'm coming, are you with me? Ze! team' became a symbol of his position against the existing political regime. It was not only a call to unite supporters of change, but also expressed his desire to become the leader who could change the established political order and lead the country to a new future (Solonyna, 2019).

However, it is important to understand that the language used by V. Zelenskyy in his speeches and campaign materials was full of symbols that reflected closeness to ordinary people, which contrasted with the perceived aloofness of the political elite. Such symbolism strengthened his sense of unity with voters, enhancing his image as a representative of the people. V. Zelenskyy often used images of ordinary citizens in his speeches, emphasising that he was a 'servant' of the people, not a 'ruler', which was in harmony with his role in the popular TV series.

It is now time to move on to the next feature of psychological influence and manipulation on social media, namely fake news and propaganda. Fake news has become one of the most powerful tools of manipulation on social media. It spreads rapidly and its consequences can be catastrophic because it has a large impact on public opinion. Social platforms, including Facebook, Twitter and Telegram, have become the main channels for spreading fake news. As these news often meet the emotional demands of the audience (e.g. refuting official statements, accusations of corruption, incitement to violence, insights from the frontline), they easily resonate with people.

In this context, we note that an integral part of this is information and psychological operations (IPO). These are specialised actions aimed at manipulating information in order to influence people's consciousness and behaviour, and to promote changes in the political, social and psychological environment. In the context of modern technologies, IPSO has been significantly enhanced by the development of tools for processing and manipulating information, in particular through the creation of fake materials – photos and videos that can convincingly imitate real events.

One of the most well-known examples of fake news is Russia's activities during the war in Ukraine. Propaganda disseminated through social media often aims to convince the public of the 'necessity' of Russian intervention, discredit the Ukrainian authorities and create an image of the enemy as 'Nazis', 'fascists' and 'Benderites'. Russian propagandists use disinformation to manipulate both Ukrainian citizens and those abroad in an attempt to influence the international political situation, as seen in the recent French elections, when Russian bot farms actively promoted candidate Marine Le Pen, who is known for her anti-Ukrainian narratives (Tereshchuk, 2024).

As we know, Russia started the war back in 2014, when it annexed the Autonomous Republic of Crimea and started military operations in eastern Ukraine. However, Russia started its propaganda campaign in 2013, when it became clear that our country was seeking to move towards Europe. One of the most significant cases of fake news spreading at that time was the incident with the 'shooting of civilians on the Maidan'. Russian media manipulated the facts, claiming that it was not Viktor Yanukovich's security forces who were shooting, but representatives of the opposition, which in turn allowed them to create a narrative about the legitimacy of the 'anti-Maidan' and support for the actions of the then president. This was a typical tactic used not only to manipulate the domestic electorate, but also to discredit the Ukrainian protests in the international arena.



After starting the war in eastern Ukraine, Russia continued to spread fake news. An example is the fake news campaign about the Ukrainian army allegedly using chemical weapons in Donbas. Russian media and bots actively spread news about the use of prohibited weapons by the Ukrainian side. These reports were refuted by numerous international organisations, but the information about the ‘atrocities’ committed by the Ukrainian military left an imprint on the minds of some people both in Ukraine and abroad.

We would like to add that propagandists also used fake news about numerous cases of ‘attacks’ on civilians that allegedly took place in the areas captured by Russia. In order to discredit the Ukrainian authorities, these news were actively shared on social media with calls to ‘restore order’ and ‘protect civilians’. This was part of a broader strategy of psychological warfare aimed at creating chaos and increasing support for aggression among the Russian population.

Analysing the fake news of that time, we cannot but recall the TV story about the ‘crucified boy’, one of the most high-profile examples of fake news and propaganda manipulations that became widespread as part of Russian propaganda during the war in Ukraine. This story was disseminated by Russian state media in 2014 and became a symbol of manipulation and deliberate distortion of facts to discredit the Ukrainian military and government.

On 12 July 2014, Channel One TV broadcast a story entitled ‘A refugee from Sloviansk recalls how the Ukrainian military executed her young son and the wife of a militia member’. In it, a woman who introduced herself as Halyna Pyshniak from Zakarpattia described the events that allegedly took place after the Ukrainian military pushed Russian terrorists led by Igor Girkin (Strelkov) out of Sloviansk. According to her, the Ukrainian military allegedly ‘crucified’ a young boy on a board. The TV report was intended to portray the Ukrainian army as brutal aggressors capable of the most serious crimes, as well as to create emotional tension among the Russian population and the international community. Even after it became clear that the story had been fabricated, the story continued to be used by the Russians as a propaganda tool, as it was repeated through various channels and social media, shifting the focus to the emotional aspect of the tragedy (Nesterenko, 2024).

Since the beginning of Russia's full-scale invasion of Ukraine in February 2022, fake news has become one of the main tools of manipulation both domestically and internationally. The Russian propaganda machine is actively spreading disinformation to achieve several goals: justifying military aggression, destabilising the political situation in Ukraine, and creating a favourable image of Russia in the eyes of the international community.

In our opinion, another feature of social media is the widespread use of artificial intelligence and image generation. Not only leading technologists, but anyone can now generate a photo or video that can be used to spread disinformation, propaganda and psychological influence.

It should be noted that Russian propaganda has various forms and ways of penetrating the Ukrainian information environment, including through ‘pro-Ukrainian’ posts, artificially generated ‘images of grandmothers with baked goods’ or even posts about brothers who ‘no one congratulated’. It is important to realise that such accounts can be run not just by random people, but often by Russian special services or those with far from good intentions.

It should be noted that one of the most popular forms of propaganda on social media is fake photos of children, grandmothers, farmers or soldiers, often accompanied by emotionally charged texts that manipulate feelings of sympathy. For example, ‘I am a lonely warrior, today is my birthday and no one congratulated me’. Such posts are usually published from accounts with no real activity or from groups created solely to collect likes and followers. Over time, these channels can be used to spread pro-Russian posts and aggressive propaganda. A particular danger is posed by posts that manipulate tragic topics, such as the wounding or disappearance of soldiers, to spread panic, collect personal data or destabilise the situation in Ukraine (Zdorovenko, 2024).



The generation of such materials with the help of AI allows us to create fake news on a completely new level. For example, deepfake technology can be used to create videos of political leaders making false statements that allegedly call for violence or even human rights abuses. These videos can be created to look completely realistic, with accurate imitation of intonation and facial expressions, making them particularly convincing.

It should be noted that IPSOs using such technologies are not limited to videos and photos, but also actively include textual information accompanying these materials. Bots and other automated systems can distribute these manipulative images on social media platforms, forums, and chat rooms, allowing fake news and disinformation to reach wide audiences. This creates the effect of ‘mass support’ for fictitious events, making it possible to influence the minds of millions of people through disinformation.

Particular attention should be paid to information bubbles, which allow social media users to receive information that confirms their own beliefs and views, while limiting access to other, alternative information.

The algorithms of social networks (such as Facebook, Instagram, YouTube) actively personalise the content that is constantly offered to users, creating a separate information reality for each one. As a result, people get caught in information ‘loops’ where they are hardly exposed to other points of view, which can lead to the reinforcement of their existing beliefs, even if these beliefs do not correspond to reality.

The Russian-Ukrainian war, in particular, intensifies this process through politically charged information that is actively circulating in the networks. Each of the parties to the conflict is trying to form a certain vision of events in the media space, using social media to mobilise support, attract new like-minded people and create strong emotional ties. At the same time, each of these parties is in its own information bubble, where only those points of view that support their national and political beliefs dominate.

Interestingly, young people who actively use social media are more likely to fall into such a bubble due to their higher tendency to social conformity, which is typical for this age. Young users, eager to confirm their beliefs, may not even notice how their activity is limited to a one-way flow of information. This phenomenon can lead to an even greater polarisation of views, as users are unable to make an objective assessment of the situation without receiving information from different sources.

However, there are factors that can reduce the likelihood of falling into an information bubble. One of them is to actively seek out diverse information and participate in open debates where different views are discussed. Users who are able to question the prevailing narratives and engage in constructive discussions are more likely to receive new, diverse information and break out of the bubble. At the same time, an insufficiently large network of interactions can limit access to alternative points of view, increasing isolation within one ideological group (Tamilina, 2024).

Finally, the bubble process is of particular importance in the context of war, as information warfare is one of the main forms of struggle. The dissemination of information from one side of the war can have a major impact on the psychological situation both inside and outside the country. Therefore, it is important to understand how social media shapes the views of users and how their information can be manipulated to increase conflict sentiment among the population.

Having examined the main types of manipulation and psychological influence in social media, we have come to the conclusion that effective neutralisation of these influences is an important component of the struggle for the formation of an objective political discourse. Given the urgency of this problem, there are several main ways to neutralise manipulations that will help increase the level of media literacy and develop critical thinking among social media users:

1) Development of media literacy and critical thinking. One of the ways to neutralise manipulation is to develop media literacy, which includes the skills of recognising fakes, understanding social

media algorithms and critical analysis of information. Users should learn to question dubious sources and study information before it is disseminated.

2) Improving content regulation and filtering. Strengthening the filtering of fake news and disinformation on platforms will reduce its spread. Platforms can add features to verify facts and provide additional information about news sources.

3) Engage independent fact-checking. Collaborating with fact-checking organisations will help reduce the level of trust in manipulation and fake news, allowing users to more easily navigate the flow of information.

4) Education through civic initiatives. Public campaigns should raise awareness of manipulation and promote analytical thinking among a wide audience.

5) Legislative initiatives to protect users. Laws should be created to provide protection against manipulation and fake news, including through transparency of political advertising and platform liability.

6) Developing technologies to detect fakes. Artificial intelligence-based technologies will help detect manipulations and reduce their impact on the audience.

7) Development of ethics and social responsibility in the media. Raising ethical standards in the media will help create a healthy information climate that will reduce manipulation in political discourse.

8) The role of social media as agents of change. Social media should become platforms for educational initiatives that promote critical thinking among users and protect them from disinformation.

**Conclusions.** The study proved that manipulation and psychological influence on social media is an important tool for shaping political discourse. Through mechanisms such as personalisation of content, targeting, use of emotional triggers, fake news and information bubbles, manipulators can significantly influence public opinion and political beliefs of users. Specific examples, such as disinformation campaigns used during political crises, including the Russian-Ukrainian war, confirm how effective these tools are in changing political narratives and shaping new political realities.

Given these problems, it is important to implement effective neutralisation strategies, including the development of media literacy, content filtering, support for fact-checking initiatives and social responsibility of the media, to minimise the negative impact of manipulations. This will help reduce the impact of fake news and manipulative technologies, contributing to the formation of an objective and constructive political discourse in the digital environment. Thus, achieving these goals is an important step in the fight for information security and democratic processes in society.

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## THEORY AND IMPROVEMENT OF PSYCHOLOGY

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### THE EMOTIONAL NATURE OF ADOLESCENTS' COGNITIVE ACTIVITY

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**Abstract.** The article discusses the emotional nature of cognitive activity. Experiments conducted with adolescents to clarify this issue are described. It is shown that during adolescence, cognitive processes that are not regulated by emotions cannot sustain their continuity for long periods. Researchers' approaches to this issue vary and these approaches clarify the connection between emotion and cognitive activity, highlighting its negative and positive aspects. Reviewing these studies enables the understanding of the emotional nature of cognitive activity in adolescents, as emotion serves as an essential and significant stimulus for cognitive activity. The article interprets the methods applied in age-differentiated groups of adolescents and their outcomes. Tasks given to participants reveal adolescents' ability to manage and regulate emotional influences in cognitive activity. It was determined that the primary causes of emotional arousal in adolescents' cognitive activity are related to the patterns of psychological age and individual characteristics. Nonetheless, social factors significantly affect their emotional domain. Interestingly, adolescents demonstrate their ability to acquire scientific knowledge in various subjects and solve complex tasks through summative assessments. However, they struggle to fully comprehend their individuality and personal qualities. They are not yet capable of sufficiently using their willpower to manage educational actions independently of emotional influences. These contradictions in the impact of emotional processes on cognitive activity create significant challenges for adolescents. All of these are associated with self-discovery and self-determination efforts arising from the age crisis, curiosity about new emotional impressions and instability in those interests. The article also identifies factors contributing to the lack of effective emotional regulation of adolescents' cognitive activity during the educational process. Examples include confusion in assigning and solving tasks, difficulties in comprehending tasks, recognizing new concepts and selecting necessary mental constructs. Other factors include the mismatch between self-assessment and academic evaluations.

**Key words:** educational activity, cognitive activity, assessment, emotion, willpower, motivation, self-regulation.

**Introduction.** The organization of adolescents' cognitive activity during the educational process is a complex issue both theoretically and practically. On one hand, the emotional state caused by the adolescent crisis and on the other, the encounter with new subjects and educational loads in school make this complexity even greater. For this reason, extensive research is dedicated to this problem in psychology. The purpose of this study is to identify existing difficulties and develop appropriate recommendations. For this purpose, various projective methods and survey tests were used in adolescent groups and the results were analyzed and summarized.

**Degree of study of the problem.** The problem addressed in the article has been studied from various aspects by researchers such as U. Neisser, R.S. Lazarus, R.J. Sternberg, A.A. Alizadeh, R. Jakobson, E.J. Kim, J. John, S.K. Park, N.Y. Karamova, A.N. Gusev, N.N. Volkova and others. These studies analyze the impact of sexual maturity, emotional tension and emotional safety in the educational environment on adolescents' cognitive activity. During the application of methods designed to study adolescents' emotional states in educational activities, it becomes possible to determine their emotional state and identify ways to reduce their tension.



**Purpose and tasks.** The purpose of the research is to study the content of emotions influencing adolescents' cognitive activity during the educational process organized with them. The tasks of the research include:

- 1) Studying the theoretical foundations of the problem;
- 2) Identifying emotional influences that can stimulate adolescents in cognitive activity;
- 3) Clarifying the positive aspects of these emotional influences;
- 4) Determining the content of the emotional environment that stimulates adolescents' cognitive activity during the educational process.

**Methods.** The research utilized theoretical analysis, tasks to determine the levels of emotional control over cognitive activity in adolescents during the solution of educational tasks, the "Determination of anxiety level" survey, Y.S. Ibadov's "Abstract compositions" test and B. Phillips' "School anxiety and emotional regulation of mental reasoning" tests.

**Discussion.** Although precise facts about the cognitive determinants of emotions have not yet been established, the idea that cognitive operations influenced by emotions and recorded in the brain are already emotionalized operations is widely accepted. For this reason, adolescents' cognitive activity is approached not only as the product of rational knowledge but also as a complex process influenced by emotions, directing their creative potential into this activity. This process can be described based on modern theories.

This phenomenon is known in NLP theory as "the release of tension from stress." In the school's physics curriculum, information about "Ohm's Law" is provided. The German physicist G. Ohm (1787–1854) experimentally proved that in a metal conductor (wire) without the involvement of any external force, the strength of the electric current flowing through it is proportionally distributed across the ends of the conductor:  $I = U/R$ , where  $I$  is the current strength,  $U$  is the electric voltage and  $R$  is the electrical resistance of the conductor. The essence of the law is as follows: every metal contains free electrons within it. These electrons have a resistance force against external influences. When an electric current is passed through the metal, the following occurs:

“1. Along with the current, an  $F$  electric force directed opposite to the force acting on the metal's electrons also affects them.

2. The free electrons within the metal move in the same direction as the current and the electric force.

3. As a result, not only the electric force applied to the conductor but also the free electrons move in the same direction as the current” (Amrahli, 2009, p. 74–75).

In 1966, radio engineer H. Silva from Texas introduced this law into psychology, enhancing its practical achievements. Using Ohm's law, the processes occurring in the human brain and mind during visualization were explained. The same law applies to the interaction between cognitive activity and emotions. Once a person begins to think and act based on those thoughts, emotions, as the locomotive of their internal energy, join this force and move alongside it.

To clarify the issue, let us focus on the theses of several cognitive theories about emotions. Cognitive theories of emotions elucidate how cognitive activity is emotionally regulated and the role of cognitive processes in the emergence of emotions. According to U. Neisser (Neisser, 1967, p. 351), R.S. Lazarus (Lazarus, 1991, p. 819-837), R. Jakobson (Jakobson, 1964, p. 21-42) and others, the integrative functions of adolescents' brain centers are responsible for attention, memory, emotion and, overall, the associative connections of cognitive activity. During psychosomatic and affective disorders, these connections weaken or are significantly disrupted.

A creative, heuristic, or emotional approach to cognitive activity does not diminish its seriousness. Renowned researchers confirm this as well. For example, R.J. Sternberg and K. Sternberg, researchers of cognitive activity, state: “Heuristics do not always lead to wrong judgments or poor decisions. Indeed, we use these mental shortcuts because they are so often right. Sometimes, they are amazingly

simple ways of drawing sound conclusions. For example, a simple heuristic, take-the-best, can be amazingly effective in decision situations” (Sternberg, 2012, p. 533).

A.A. Alizadeh (Alizadeh, 2009, p. 576), M.P. Jakobson (Jakobson, 1964, p. 21-42), N.Y. Karamova (Kim, 2020, p. 121-130) and others pay special attention to the role of emotions in adolescents' educational activities. According to these researchers, the influence of emotions on adolescents' cognitive activity stems from the change in their leading activity. The transition of leading activity in adolescents to personal-intimate relationships strengthens the connection between cognitive activity and the emotional domain. N. Y. Karamova comments on the link between cognitive processes and the emotional domain in adolescents as follows: “The obtained results demonstrate the characteristics of the influence of emotional tension on the psychophysiological processes of healthy and oligophrenic adolescents depending on the level of individual personality development. Unlike healthy adolescents, oligophrenics do not develop a response reaction to emotionally tense situations. At the same time, the actualization of cognitive processes depends on individual characteristics and the level of mental development, as well as functional interrelations. The results prove that the actualization of cognitive processes depends on the optimal level of emotional tension” (Keremova, 2011, p. 4).

Deep analyses conducted by E.J. Kim, J. John, S.K. Park and others also examine these facts: “Despite significantly faster reaction times during the emotional empathy task, the adolescent group showed greater activity levels in brain regions related to emotional empathy when compared to the adults. Interpreting this finding requires the consideration of two points” (Kim, 2020, p. 121-130).

Although emotions are not regulated by cognitive components, they can be cognitive in nature in terms of content. For example, through the power of effort, the cognitive activity delayed under the influence of negative emotions can become reactivated. During decision-making, past impressions differ in their emotional tone along with other characteristics when selected from memory materials.

In many emotional-cognitive theories, the intensity and nature of the emotional state that arises during cognitive activity are also associated with empathy. The cognitive theory of emotions authored by M. Arnold and R. Lazarus provides a clearer explanation of this phenomenon. These theories show that, in many situations, emotions actually play the role of determinants of cognition and serve as intuitive evaluations. Like actions, emotions are also based on this evaluation. R. Lazarus does not view affective reactions merely as impressions. For him, emotion is more of a syndrome in nature. This syndrome encompasses three main groups of symptoms: subjective impressions, physiological changes and movement reactions. R. Lazarus believes that an emotional reaction reflects some syndrome, one of its components, or an internal stimulus. In this regard, two main theses are proposed in R. Lazarus's concept:

- 1) Not every emotional reaction fully expresses its content
- 2) The thought or knowledge expressed through an emotional state may not necessarily be the complete opposite of that emotion (Lazarus, 1991, p. 919-837).

Although the characteristics of such emotional states in adolescents are extensively explained, there are few effective and optimal ways to eliminate them. As emphasized in the approaches of P.M. Jakobson, a researcher of emotions during adolescence: “Of course, we are discussing only a small aspect of the problem here. Regarding behaviorism, the emotional reactions of humans are explained as being accepted based on their strength, organization, or disorganization. The adequacy of an emotional reaction is based on the precision of orientation in life circumstances” (Jakobson, 1964, p. 21-42).

The issue we aim to clarify here is to determine the psychological causes of inhibitory and distracting effects on adolescents' emotional-cognitive activity and to identify appropriate correction methods. For this purpose, in addition to traditional measurement methods, alternative approaches were also applied. To test these ideas experimentally, research was conducted using the following methodology.

Adolescents aged 10-13: Grades V-VII.

1. The "Abstract compositions" projective test
2. The "Determination of anxiety level" survey for adolescents
3. Tasks to determine levels of emotional control over cognitive activity in adolescents during the solution of educational tasks.

Adolescents aged 14-15. Grades VIII-IX.

1. The "Abstract Compositions" projective test.
2. Biman Phillips' "School anxiety" test.
3. The "Emotional regulation of mental reasoning" test.

Since clarifying the emotional content of cognitive activity is challenging, we first turned to the methods of alternative psychology. Using Y.S. Ibadov's "Abstract compositions" test, we diagnosed adolescents' emotional-cognitive sphere. The test was developed by Y.S. Ibadov in 1999 with the help of a psychogram and successfully applied in schools in the Narimanov and Yasamal districts of Baku from 2001 to 2003. The essence and diagnostic and corrective significance of the test are extensively explained in the source.

Our primary goal in applying the test was to analyze the emotional state of the participants by examining the volume of colors and their interrelation in the compositions through laboratory analysis. The results of the participants involved in the testing were evaluated using a specially designed computer program. Through the application of the "Abstract compositions" test, it becomes possible to implement the psychoprophylaxis, psychodiagnostics and psychocorrection of artistic creativity abilities by properly directing mental energy. This includes studying the sensitivity and impact strength of emotions on the psyche, managing actions, properly directing activities, improving visual acuity, expanding the field of vision, strengthening visual memory, enhancing emotional resilience and developing abstract thinking and creative imagination. The "Abstract compositions" test was applied to all participants aged 10–15.

For now, we will analyze the results of adolescents aged 10–13. These results were summarized based on laboratory analyses and percentage indicators of colors. Let us examine the results of 10 participants selected from each age group. According to the results, adolescents aged 10–11 and 11–12 from School No. 285 predominantly chose warm colors. Although differences were minimal, pupils in grades V and VI were more likely to select yellow, red, light green, orange and pink when completing the test. In contrast, 12–13-year-olds showed a preference for cool colors at a rate of 3.92%.

We also compared the results with the adolescents' summative assessments. It can be stated that no clear correlation was found between the choice of colors in abstract compositions and grades in any age group. On the contrary, some adolescents with grades of 3 produced more meaningful and complex compositions than those with grades of 4 or 5. Such dependency was observed in gender differences, where girls showed a greater preference for warm colors compared to boys.

In the study, we aimed to determine whether adolescents' emotional states changed due to natural characteristics or educational situations. For this purpose, we conducted work based on the "Methodology for determining the emotional nature of adolescents' cognitive activity" in grades V and XI of both schools using a selected sample. Subsequently, we conducted the "Determination of anxiety level" survey to assess the emotional regulation of activity during the solution of educational tasks in grades V–VII. The results were summarized based on scores.

In both control and experimental groups, the highest anxiety level was recorded at ages 12–13: 38.09% in the control group and 33.33% in the experimental group. These are Grade VII pupils. It should be noted that in the experimental groups, the levels were the same for both ages 11–12 and 12–13. Considering that the testing was conducted during the second half of the academic year, this predominantly corresponds to the second phase of age 12. In developmental psychology, the most intense phase of the adolescent crisis coincides with ages 12–13. Therefore, the primary reason for the develop-

ment of anxiety at this level should be sought not in social factors but in the regularities of psychological age. The lowest anxiety level, on the other hand, was observed at ages 10–11, corresponding to Grade V. Since they are still in the initial phase of the crisis, these results are natural. Based on Table 3, we can observe the differences in the impact of anxiety on adolescents' cognitive activity by age.

During the research period, the pedagogical-psychological environment of the school was analyzed and it was determined that the main reason for this was related to social factors. Based on the tasks given to Grades V, VI and VII, we clarified the abilities of pupils to manage and regulate the influence of emotions in their cognitive activity during problem-solving.

Table 1

**Results of the "Determination of anxiety level" survey by age**

Ages	Levels							
	High Anxiety		Moderate Anxiety		Low Anxiety		Total	
Control classes	Person	Percentage	Person	Percentage	Person	Percentage	Person	Percentage
10–11 years – Grade V	5	25,00 %	11	55,00 %	4	20,00 %	20	100 %
11–12 years – Grade VI	6	31,57 %	10	52,63 %	3	15,78 %	19	100 %
12–13 years – Grade VII	8	38,09 %	10	47,61 %	3	14,28 %	21	100 %
Results by classes	19	31,67 %	31	51,66 %	10	16,67 %	60	100 %
Experimental classes								
10–11 years – Grade V	2	13,33 %	10	66,66 %	3	20,00 %	15	100 %
11–12 years – Grade VI	5	33,33 %	8	53,33 %	2	13,33 %	15	100 %
12–13 years – Grade VII	6	33,33 %	7	38,88 %	2	11,11 %	18	100 %
Results by classes	13	27,08 %	25	52,08 %	7	14,58 %	48	100 %
Overall results	32	30,47 %	56	53,33 %	17	16,19 %	105	100 %

Table 2

**Levels of emotional control in cognitive activity among adolescents aged 10–13**

Ages	Levels							
	High level of emotional control		Moderate level of emotional control		Low level of emotional control		Total	
Control classes	person	percentage	person	percentage	person	percentage	person	percentage
10–11 years – Grade V	7	35,00 %	8	40,00 %	5	25,00 %	20	100 %
11–12 years – Grade VI	6	31,57 %	9	47,36 %	4	21,05 %	19	100 %
12–13 years – Grade VII	7	33,33%	8	38,09 %	6	28,57 %	21	100 %
Results by classes	20	33,33 %	25	41,66 %	15	25,00 %	60	100 %
Experimental classes								
10–11 years – Grade V	5	33,33 %	10	66,66 %	5	33,33 %	15	100 %



Continuation of the table 2

11–12 years – Grade VI	4	26,66 %	5	33,33 %	6	40,00 %	15	100 %
12–13 years – Grade VII	5	27,77 %	5	27,77 %	8	44,44 %	18	100 %
Results by classes	14	29,16 %	20	41,66 %	19	39,58 %	48	100 %
Overall results	34	32,38%	45	42,85 %	34	32,38 %	105	100 %

In solving the tasks, the main requirement was to adhere to the set time and ensure accuracy. Adolescents aged 12 achieved the highest results in this task. It appears that their age allowed them to demonstrate their cognitive abilities in solving the given tasks. Although class differences were minimal, the results from the Jalair village school were still superior in certain respects.

Significant differences were identified between the anxiety levels and emotional control over cognitive activity in adolescents aged 10–13. According to the results of this task, the highest level of control was 33.33% at School No. 285, compared to 29.16% at the Jalair village school. However, the lowest level of control was 11% higher in the Jalair school. The moderate level was 3.57% higher at School No. 285. Interestingly, the academic performance of the control school had previously been lower in our studies.

Now, let us examine the emotional regulation of cognitive activity in adolescents aged 14–15 (Grades VIII and IX) using methods suited to their age levels.

### 3.1. Y.S. Ibadov's "Abstract compositions" projective technique.

According to the test instructions, a 50/50 ratio of warm and cool colors indicates harmony in the emotional sphere. If warm colors dominate, this reflects an abundance of positive energy (masculine energy), while a dominance of cool colors indicates an excess of negative energy (feminine energy). When both colors are balanced, the regulation of cognitive activity becomes easier. It is also noted that the quantity of colors does not necessarily correlate directly with adolescents' academic performance; it might or might not.

It is evident that adolescents with higher grades do not always exhibit moral, ethical, psychological, or other personal qualities in alignment with their scores. Here, the discussion revolves around the individual's inner harmony, life energy and the positive direction of their goals and thoughts. According to the test results, the outcomes for 14- and 15-year-olds were similar to those of 13-year-olds. They also showed a preference for cool colors. Girls predominantly chose warm colors, whereas differences in the preference for cool colors among 15-year-olds were 15.48%, mainly due to boys' results. As a result, the dominance of cool colors in adolescents was evident, with the following sequence of preferences: green, blue, purple, black and chestnut. In warm colors, the preferences were: red, yellow, orange and pink. The following observations were commonly noted:

1) Apathy, boredom and a search for distractions caused by unengaging educational conditions that failed to create a positive emotional mood (e.g., playing with phones or other devices, working on tasks from other lessons, chatting with peers, gazing out the window, resting one's head on the desk, arguing with the teacher and more).

2) Anxiety, confusion, shyness, anger and other emotional states arising from tense situations where role behaviors were not met.

Each of these emotional states creates various inhibitory challenges for adolescents' cognitive activity. In educational situations where motivation was lacking, problems were not clarified, hypotheses were not proposed and research questions were not addressed, the situation worsened. On the contrary, in lessons structured with interactive and creative methods, emotional comfort, security and initiative were observed. Activities such as asking questions, participating in discussions, searching

for solutions, proving the validity of their opinions and striving to achieve goals were more evident. These aspects were also reflected in the pupils' cognitive activity.

Such situations were partially observed in the Grade VI "a" class at School No. 285 and in Grades V and VIII at the Jalair village school.

3.4. Biman Phillips' "School Anxiety" test.

This test was developed to study the fear of school and the anxieties caused by school-related events in young and middle-school-aged pupils. It consists of 58 survey questions and can be conducted orally or in written form. Each question is answered with "Yes!" or "No!" If 50% of the responses do not match the key, it indicates heightened anxiety and if 75% or more responses do not match, it indicates a very high level of anxiety. Based on the results, the following factors contributing to anxiety are identified.

Table 3

**Results of B. Phillips' "School Anxiety" test for School No. 285**

No.	Factors	Grade VIII – 23 participants		Grade IX – 25 participants		Total – 48 participants	
		p.	%	p.	%	p.	%
1.	General anxiety related to school	0	0	2	8,00%	2	4,16%
2.	Social stress experienced at school	3	13,04 %	5	20,00%	8	16,66%
3.	Need for achievement	4	17,39 %	2	8,00%	6	12,50%
4.	Fear of being unable to express oneself	3	13,04 %	2	8,00%	5	10,41%
5.	Situations of knowledge assessment	3	13,04 %	4	16,00%	7	14,58%
6.	Fear of not meeting expectations	5	21,73%	3	12,00%	8	16,66%
7.	Weak resistance to stress	3	13,04 %	2	8,00%	5	10,41%
8.	Conflicts with teachers	2	8,69%	5	20,00%	7	14,58%
Overall anxiety		23	100%	25	100%	48	100%

Significant levels of anxiety were identified in participants from School No. 285 based on the results of B. Phillips' test. Various situations arising at the school caused anxiety in the majority of adolescents aged 14–15. Among the 48 participants, anxiety was recorded for 2 to 5 adolescents across different criteria for each of the 8 metrics.

Table 4

**Results of B. Phillips' "School anxiety" test for Jalair village secondary school**

No.	Factors	Grade VIII – 15 participants		Grade IX – 15 participants		Total – 30 participants		Overall results	
		p.	%	p.	%	p.	%	285	Jalair
1.	General anxiety related to school	0	0	0	0	0	0	4,16%	0
2.	Social stress experienced at school	1	6,66%	1	6,66%	2	6,66%	16,66%	6,66%
3.	Need for achievement	3	20,00%	4	26,66	7	23,33%	12,50%	23,33%
4.	Fear of being unable to express oneself	3	20,00%	1	6,66%	4	13,33%	10,41%	13,33%
5.	Situations of knowledge assessment	3	20,00%	2	13,33%	5	16,66%	14,58%	16,66%
6.	Fear of not meeting expectations	4	26,66%	5	33,33%	9	30,00%	16,66%	30,00%
7.	Weak resistance to stress	1	6,66%	2	13,33%	3	10,00%	10,41%	10,00%
8.	Conflicts with teachers	0	0	0	0	0	0	14,58%	0
Overall anxiety		15	100%	15	100%	30	100%	100%	100%

At School No. 285, the highest indicator was "Fear of not meeting expectations" (8 participants – 16.66%) and "Situations of knowledge assessment" (7 participants – 14.58%). The results of Jalair Village School were better than those of School No. 285. No cases of "General anxiety related to school" or "Conflicts with teachers" were recorded at Jalair Village School. The highest anxiety-inducing factors at this school were "Fear of not meeting expectations" (9 participants – 30%) and "Unfulfilled need for achievement" (7 participants – 23.33%). The lowest result was for the factor "Social stress experienced at school."

Subsequently, we compared the results of both schools (Figure 3.2.4). The figure clearly shows that stress factors and the anxiety arising from them were at a lower level in Jalair Village School. Overall, the factor that caused the highest anxiety among participants was "Fear of not meeting expectations" (16.66% at School No. 285 / 30% at Jalair School). This was followed by "Unfulfilled need for achievement" (12.50% at School No. 285 / 23.33% at Jalair School).

Interestingly, while adolescents prove their ability to acquire scientific knowledge in various subjects and solve complex tasks through summative assessments, they still struggle to fully understand their individuality and personal qualities, as well as to use willpower to manage their actions independently of emotional influences. These contradictions between volitional and emotional processes create significant difficulties for adolescents. This is associated with the self-searching and self-determination efforts arising from the age crisis, curiosity about new emotional impressions and the instability in those interests.

### 3.5. "Emotional Regulation of Mental Reasoning" test.

Participants carefully listen to reasoning and the conclusions derived from them. Some conclusions are correct, while others are incorrect. Participants must identify the correct and incorrect conclusions and record their answers on small cards provided to them. According to the rules, each participant in group testing is given one card. At the top of the card, participants write their first and last names and their class. Each answer is allocated one line. Corrections, rewriting, or erasing on the cards is not allowed.

Table 5

#### Assessment criteria for the "Emotional regulation of mental reasoning" test

Number of mistakes	Points	Emotional-logical levels of cognitive activity
0	5	High emotional-logical level of cognitive activity
2-3	4	Moderate emotional-logical level of cognitive activity
4-6	3	Low emotional-logical level of cognitive activity

Each task is allocated 10 seconds for consideration. The mental conclusions related to judgments 1, 3, 5, 7, 9 and 11 are incorrect, while all other mental conclusions are correct. The results are described in the table below. The results of the "Emotional regulation of mental reasoning" test indicate differences in percentage indicators between the two schools. Participants with a high level from School No. 285 were 7.5% higher than those from Jalair School. Conversely, in the moderate level, School No. 285 showed a 5.42% higher percentage. Those rated as weak were similar in both schools.

The results of the "Emotional Regulation of Mental Reasoning" test reveal that among 78 adolescents aged 14–15, 14 individuals (17.94%) either do not think at all or cannot think about the main ideas in the tasks given to them. Their mental constructions are poorly formed and emotional control over cognitive processes is weak. As a result, their emotional-logical level of cognitive activity was rated as "low."

For 39 individuals (50%), these processes were managed at a moderate level, while 25 individuals (32.05%) demonstrated a high level of control. If the participants had experience in effectively utilizing their internal capacities and regulating their cognitive activity emotionally, the results could have been even better.

Table 6

**Results of the "Emotional regulation of mental reasoning" test**

Schools	Classes	Emotional-logical levels of cognitive activity						Total	
		high		moderate		low			
		p.	%	p.	%	p.	%	p.	%
School No. 285	Grade VIII	6	26,08%	12	52,17%	5	21,73%	23	100%
	Grade IX	8	32,00%	13	52,00%	4	16,00%	25	100%
	Sum	14	29,16%	25	52,08%	9	18,75%	48	100%
Jalair Village School	Grade VIII	5	33,33%	7	46,66%	3	20,00%	15	100%
	Grade IX	6	40,00%	7	46,66%	2	13,33%	15	100%
	Sum	11	36,66%	14	46,66%	5	16,66%	30	100%
Total		25	32,05%	39	50,00%	14	17,94%	78	100%

The analysis allowed us to conclude that the regulation of adolescents' cognitive activity in the educational process significantly depends on the state of their emotional-volitional domain. This dependency is characterized by the fact that the majority of those rated as "low" also had poor academic grades. Delays in the development of their needs, lack of motivation in their activities and incompleteness in their cognitive activity were noted.

**Conclusions.** The primary challenges in the effective emotional regulation of adolescents' cognitive activity during the educational process arise from the weakness of key regulating factors—inclinations, needs and interests. Additionally, insufficient development of the emotional domain according to psychological age and difficulties in preventing anxiety and distress while performing tasks are among these factors. Another issue contributing to the ineffective emotional regulation of cognitive activity during the educational process is confusion experienced by some participants when tasks are assigned or solved, as well as difficulties in comprehending tasks, recognizing new concepts and selecting the necessary mental constructs. Furthermore, the discrepancy between self-assessment and academic evaluation was another reason complicating the emotional regulation of adolescents' cognitive activity. Based on the facts observed during the study, we believe it is necessary to explore the correlation of self-assessment with other indicators.

The dependency between adolescents' emotional state and the effective regulation of cognitive activity is influenced by numerous factors. The most significant include how emotionally stable and resilient adolescents are and how confident they feel about their social roles. Another key factor is their ability to regulate cognitive activity appropriately in relation to the requirements set by tasks. Additionally, the construction of high-level mental constructs within the cognitive domain is also essential. The emotional nature of adolescents' cognitive activity primarily manifests as an individual characteristic. This nature, on one hand, reflects their temperament type and on the other, the emotional tone of the cognitive system as a whole, combined with willpower, shapes the cognitive style in their activity.

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## THEORY AND PERSPECTIVES OF PHILOLOGY

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### POETIC FEATURES OF PARCELLATIVE SENTENCES

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**Abstract.** Parcellative sentences are an important component of the syntactic system of a language. Parcellative sentences are used at the level of a stylistic figure as one of the syntactic tools that serve to create an expressive-emotional shade of meaning in the language. The information intensity that occurs in such sentences is of particular importance from the point of view of creating poeticism. Therefore, parcellative sentences can also be considered as a product of artistic information due to their nature. The emotionality, expressiveness, and artistic depiction conveyed in parcellative sentences are embodied through unique ethnocultural sources in each nation. In this sense, parcellative sentences possess mental characteristics. Parcellative sentences, formed on an ethnocultural foundation, create similar semantics in different languages from the perspective of thought typology. Therefore, parcellative sentences form a paradigm with an interlingual universal character. However, since each language has its own unique qualities, parcellatives have developed distinct means of expression in different languages.

**Key words:** parcellation, poeticism, emotionality, grammar, semantics.

**Introduction.** Parcellative-type sentences constitute an important component of the syntactic system of the language. Parcellative sentences are such a vivid means of expression of emotional, expressive, pompous speech that they are universal in terms of animating artistic information. In particular, a number of research works have been carried out in Russian and English on parcellative sentences, which are remarkable for their artistic expression capabilities. In Azerbaijani linguistics, there is almost a noticeable gap in this field. In some cases, parcellative sentences are examined and analyzed within either conjunctive or attributive clauses. The term parcellation is originally from Latin-French. It is presented as a term that literally means constituent, division, share, and in linguistic terms, refers to the division of a whole sentence into parts.

The term *parcellation* was first introduced by A.F. Yefremov in his research on “The Language of Chernyshevsky”, based on the observation of sentence types divided into several parts in speech.

The term *parcellation* is presented as follows in the “Explanatory dictionary of linguistic terms”: “*Parcellation – a way of expression that involves moving one or more syntagms within a sentence to the end and making them independent through a special pause. “However, nothing will change in his life until his death. His wife. Three daughters. The same relatives. Colleagues, neighbors. The same conversations, jokes, worries, anxieties. The same gatherings, friend... (Anar)” (Adilov, 2020).*

In the explanation provided for the parcellation of the example sentence, it is noted that in such types of sentences, the idea is conveyed not in a complete, finished structure, but rather in expression tools that are more or less independent. It is also noted that the parcellative sentence is widely used in the literary style, and unlike connective constructions, parcellative units are used after the main sentence. (Adilov, 2020).

**Examination of the theme.** It is possible to say that the following characteristic features exist regarding parcellative sentence types: *Firstly*, parcellative sentences are expressive, emotional in

nature, and the embodiment of artistic information in them is of primary importance; *secondly*, parcellative sentences, while serving the purpose of bringing artistic information to life, can also be regarded as a stylistic figure at the same time; *thirdly*, parcellative sentences consist of two main constituents from a structural point of view. The first constituent focuses on the main information, while the second constituent provides an artistic recreation of the feelings, sensations, perceptions, and emotions in the first constituent; the first component is used as a main core sentence, the second constituent can also be used as several sentences or phrases; fourth, it is not correct in terms of sentence structure to consider the parcellative component as a member or part separated from the main sentence. Because the main idea in the first part sentence is completed. The second parcellative constituent revives the emotions related to the first. Thus, the first and second constituents are connected not based on grammatical structure principles, but in terms of artistic information and linguopoetic characterization. As a result of this stylistic-semantic approach, the two constituents of parcellative sentences can create a sequence with each other, forming an image of a complete sentence. In separate research works dedicated to parcellative sentences, it is certainly possible to encounter interesting ideas and observations related to their structural-semantic and artistic information characteristics. For example, in K.Ahmadova's article titled "Sentences built on parallel subordination", it is stated that parcellative sentences create the "stylistic synonym of a constructivist form taken from the writer's language". Also, a dubious approach to the perception of parcellative sentences as a single syntactic composition is felt here. That is, parcellative sentences are not actually perceived at the level of a single syntactic construction. Such sentences, in the author's opinion, are used as artistic-stylistic figures, and therefore their syntactic construction is perceived as broken (Ahmadova).

In an article by Leyli Najafova dedicated to elliptical sentences, referring to F.Y.Veysalli, they are even presented as an example of parcellation, taking into account that these sentences are not formed as a complete syntactic construction (Najafova, 2020).

In a research paper by Mehman Musayev dedicated to the syntax of complex sentences, parcellative sentences are explained as a broken type according to the traditional rule. However, an interesting idea is also put forward here, namely that sentences separated from the main sentence are structurally manifested as a complex syntactic whole (Musayev, 2010). Here, of course, if the concept of a "broken component" is set aside from a grammatical perspective, the ability of parcellatives to form a complex syntactic whole can be considered entirely accurate. Because the part that serves to bring artistic information to life after the main core sentence can consist of not just one but several phrases or even sentences. In Russian linguistics, the main motive for research on parcellative sentences is the consideration of the formation of syntactic constructions of this type through division and breaking into parts. Here, of course, the main attention is paid to the fact that more than grammatical stability, the influence of the speech act plays an important role. Parcellative sentences are approached as a form of expression characterized by emotionality, accompanied by special intonation, rhythm-creating features, synsemantic qualities, and stylistic figures. From this it can be seen that parcellative sentences are not directly included in the object of study of grammar, but of stylistics, or more precisely, of poetic syntax. In this regard, specific examples are shown of how parcellation gains a broad functional environment in the language and creates emotional diversity in individual stylistic categories.

Research studies dedicated to parcellation typically discuss its role in creating imagery in artistic language, evoking subtle feelings and emotions, delivering artistic information intensively, and possessing an impactful effect on understanding in the process of speech communication. At the same time, parcellation, due to its communicative nature, is perceived as a means of communication that occurs according to the norms of spoken language.

Parcellative sentences, in certain cases, structurally resemble the inverted variant of attributive clauses and, to some extent, coordination clauses. For example, The inverted variant of the attributive clauses provided in the book "Modern Azerbaijani language" is interesting in this regard: "*Whenever*

*I come to your door asking for bread, command your servants to drive me away*” (A.Hagverdiyev); *“Whenever we get together, we never stop talking about these annoying things.”* (Y.V.Chamanzaminli) (Abdullayev, et al., 2007).

When the given sentences are converted to the inversion variant as follows, the subordinate clause moves to the end and the parcellative form is obtained: *“Command your servants to drive me away, whenever I come to your door asking for bread”*; *“We never stop talking about these annoying things, whenever we get together”*. As seen, the attributive clause in its nominative structure conveys ordinary information; however, in the inversion variant, it brings artistic information to life and resembles parcellation. However, of course, not all attributive clauses can be transformed into the parcellative variant. Because nominativity is characteristic of attributive clauses, while emotionality, artistic informativeness, and rhetoric are characteristic of parcellation. An explanation regarding coordination subordinate clauses is provided in the book “Modern Azerbaijani language” as follows: “A coordination subordinate clause is added after the main clause, providing an evaluation of its content or offering additional information related to it”: *“I have only a small amount of tobacco for my cigarette, and I've saved it for the last days”* (Abdullayev, et al., 2007). As seen from the sentence, the main information is expressed in the first constituent. The information in the second constituent consists of an addition that complements the idea expressed in the first. Although such sentences are structurally reminiscent of parcellation, they differ semantically from parcellations, which are stylistic figures.

In parcellative sentences, the constituents create the impression of independence in character. The second constituent part is not used as a grammatical addition to the first; instead, it brings the content presented, proposed, or expressed in that part to life with emotional intensity. In this case, the second constituent part serves as an artistic informational tool for the nominative meaning in the first part. That is to say, it does not specifically define any element in the first constituent part, nor does it belong to it. On the contrary, it enhances the nominative nature of the entire sentence in terms of emotionality, adding stylistic diversity to it. Therefore, it is no coincidence that in scientific literature, parcellatives are identified with expressive means within the framework of stylistic figures.

Parcellatives, in terms of poeticizing the general content of the core sentence, consist of phrases, words, and even sentence components. In both cases, the content expressed in the main sentence through the use of parcellatives becomes rhetorical and characterized by rhythmic harmony. The sequence and repetition of parcellatives determine the degree to which emotionality is brought to life in the sentence. The following sentences can be given as examples: *“In ninety places, there was dark-colored silk spread out. In eighty places, the beds were arranged. There were golden-footed pitchers lined up. Nine girls with black eyes, beautiful faces, hair braided behind, golden buttons on their chests, hands adorned with henna on their wrists, and fingers full of mystery — beloved infidel daughters. They would herd their cattle to the thick Oghuz lords and graze them there”* (Kitabi-Dede Gorgud, 2004).

*“The guests had gathered in the hall. Tables were arranged in the center, and on the tables were laid out various sweets, rusks, baklavas, candies, lemons, oranges, and dried fruits”* (Mammadguluzade, 2004). The phrases from the first example, *nine girls with black eyes, beautiful faces, hair braided behind, golden buttons on their chests, hands adorned with henna on their wrists, and fingers full of mystery*, the phrases and word-compound expressions in the second example, *various sweets, rusks, baklavas, candies, lemons, oranges, and dried fruits*, are parcellatives that enliven the general content of the main sentence with emotional nuance. They are not actually additions to the sentence, nor do they extend beyond the sentence structure; rather, they are stylistic figures that serve to enhance the rhetorical quality of the sentence and create a poetic dimension.

A significant portion of parcellatives is expressed in the form of sentences. In such parcellatives, the emotional expression style is characterized by a distinct intensity, depending on the type, form, and nature of the sentences. Sentence-based parcellatives, functioning both as sequential and parallel

syntactic constructions, add stylistic diversity to the nominative concept in the main sentence. At the same time, a poetic harmony is created in the sentences through repetitions and parallels: a) in consecutive parcellatives characterized by repetition: “*A man, may I see you with neither joy in your heart nor a smile on your face, for you have unjustly brought us to misfortune. Who knows when we will finally be free from this investigation? The Russian investigation won't end in five years. Who will harvest our grain, who will thresh our crops!*” (Akhundzade, 2005).

In this example, the sentences “*Who will harvest our grain*” and “*Who will thresh our crops*” are used consecutively, providing emotional nuance to the overall content of the preceding sentences that convey the main idea, on the other hand, they create a poetic imagery with rhythmic harmony; b) in parcellatives expressed by parallel syntactic constructions: “*sometimes it happened that in a short moment, fog and mist would envelop Chanlibel. The sky was thundering, lightning was flashing, and rain was falling*” (Koroghlu, 1959).

Here, the constituents “*The sky was thundering, lightning was flashing, and rain was falling*” are parcellatives consisting of parallel components. The sentence emotionally portrays the scene of events and is characterized by rhythmic harmony; c) *in parcellatives which its predicate is expressed in the main clause*. This part of the parcellatives is used as a sentence of a consecutive element. The predicate of such sentences is consistent with the main sentence. Such sentences, which are used sequentially, are grammatically connected to the main informant through the predicate. At the same time, sequential parcellative components transform into the artistic information medium of the main sentence: “*Among the fugitives, there was one with a turban on his head. He had a rifle on his shoulder, a dagger at his waist, and a horse beneath him*” (Rovshan, 2006).

**Conclusions.** The main source of derivation of parcellative syntactic constructions is based on the emotional sources of artistic thinking. Emotionality, emotional perception, and its transition to cognition in the process of thought emerge in relation to universal psychological typology. Since such a typology is a common process in human thinking, it also leads to the emergence of universal means of expression in language. But of course, such a physio-psychological process does not manifest itself in the same way in all peoples. In whatever ethnocultural environment the impression of emotionality is, the means of its expression occur in that nation. Since there are multifaceted manifestations of emotions in the ethnocultural genesis of the Azerbaijani people, the forms of expression of these impressions are also rich in these people. Therefore, in the Azerbaijani language, parcellatives have developed into a multifaceted environment as one of the linguistic tools serving the vivid expression of emotions. The study and analysis of them hold particular importance in terms of both grammatical and ethnolinguistic as well as linguopoetic expressions.

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## GRAMMATICAL INTERFERENCE IN THE FIRST AND SECOND FOREIGN LANGUAGE: A RATIONAL APPROACH<sup>1</sup>

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**Abstract.** The article presents a methodology for overcoming grammatical interference in the context of learning multiple languages. This methodology is based on a rational approach and involves a comprehensive system combining learning content, principles, methods, techniques, tools, technologies, and diagnostic measures to achieve optimal results while minimizing effort. The proposed model follows an algorithm with key stages: identifying grammatical phenomena, analyzing their similarities and differences across languages, predicting difficulties, interpreting grammatical functions, systematizing knowledge, applying grammar in communication, and evaluating the effectiveness of learning outcomes. These tools are supplemented with a system of exercises and real-life communication tasks to address common and distinctive grammatical challenges.

Experimental testing demonstrated that students significantly improved their practical mastery of German grammar. The study highlights the importance of psychological and pedagogical conditions, including the sequence of learning stages, rationalization tools, and real-life tasks, to support the learning process.

**Key words:** grammatical interference, rational approach, typological features, learning algorithm, comparative grammar tables, real-life communication, second foreign language.

**Introduction.** In modern society, the problem of interethnic and intercultural relations is becoming increasingly important. Contacts between cultures are driven by the growth of economic, political, scientific, and social ties, as well as the development of information and technology, which requires the knowledge of two or more foreign languages. With the help of linguistic and cultural competences, an individual is involved in ethnic, national, world cultures, social experience, spiritual and value heritage. Expansion of linguistic competences is a condition for successful socialisation in a multicultural environment.

In the context of learning multiple languages, the problem of interference arises, which manifests itself at all levels of language proficiency. One of the types of interference is grammatical interference, which requires the search for new approaches that can provide new effective ways to obtain more productive results in the context of learning multiple languages.

The rational approach, which involves the desire to minimise costs to achieve the most effective results, provides ample opportunities for intensifying this process. This approach is especially appropriate in the context of overcoming grammatical interference, which requires the development of a special methodological system. The rational approach allows to ensure the most appropriate organisation of learning activities of foreign language learners, which improves the quality of teaching both foreign languages and achieves higher results with the least time expenditure. However, the practice of teaching a foreign language at universities in the context of learning several foreign languages shows that this approach is not properly applied, which leads to complications in the educational process.

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All the above factors determine the relevance of our study aimed at solving the problem of overcoming grammatical interference using a rational approach in the process of learning English and German. The study of the conditions and factors of implementation of the rational approach will allow overcoming grammatical difficulties based on comparative and contrastive analysis in the context of learning several foreign languages.

**Main part.** At present, there is a certain scientific basis for considering the problem of overcoming grammatical interference when learning several languages. A comprehensive analysis of the problem in our study was facilitated by:

– works on various aspects of interference in the process of learning multiple languages (Juhasz, 1969: 195-198; Karim, Nassaji, 2013: 117-134; Kulchytska, 2010: 241-245; Shablii, 2004: 371-375; Valihura, 2009: 104-110 etc.);

– works that reflect the specifics of the methodology of teaching a second foreign language (Bausch, 1995: 445-451; Christ, 1994: 72-78; David, 1991; Ervin, Osgood, 1954; Ervin, Osgood, 1965; Harrison 1973, Nikolaieva, 2002, Sinha, Banejee, Sinha, Shastri, 2009: 117-122; Swan, Smith, 2002 etc.);

– research on overcoming grammatical interference in the process of learning a foreign language (Huber, 1981: 57-76; Köhler 1975; Myskiv 2014: 101-103 etc.);

– scientific publications related to the consideration of psychological patterns of interaction in the process of foreign language communication (Grosjean 1982; Hamers, Blane 1989; Weinreich 1977 etc.).

The object of our study is the process of teaching students the grammatical side of language in the context of learning English and German based on the application of a rational approach. The subject of the study is the methodology of overcoming grammatical interference based on the rational approach in the context of learning English and German. The purpose of the study is to develop the theoretical foundations of the methodology for overcoming grammatical interference based on the application of a rational approach in the context of learning English and German.

The hypothesis of the study is that the methodology of overcoming grammatical interference based on the rational approach in the context of learning English and German will be effective if there is:

1) a methodological model of overcoming grammatical interference based on the application of a rational approach when students learn several foreign languages, which will cover the purpose, tasks, content, principles, methods, techniques, technologies, means, conditions and diagnostic tools, learning outcomes and will be based on the consideration of common and differential features of the grammatical systems of the languages being studied;

2) special teaching and learning materials (a system of tasks to overcome typical grammatical difficulties in learning German and English, comparative grammar tables and reference grammar tables), which will help to form a single cognitive base;

3) application of a special algorithm, which includes the following stages: awareness and identification of a grammatical phenomenon; analysis of common and differential features of a grammatical phenomenon in foreign languages; prediction of possible grammatical difficulties; interpretation of the function of a grammatical phenomenon in the languages being studied; systematisation and generalisation of the experience of the studied grammatical phenomenon; use of the studied grammatical phenomenon in situations of real communication; re-checking the effectiveness of the use of the studied grammatical phenomenon to solve the set problems;

4) implementation of a set of methodological conditions: adherence to a clear sequence of tasks in accordance with the stages of the algorithm for overcoming grammatical interference in the process of learning several languages; application of a system of rationalisation tools (comparative grammar tables and reference grammar tables) aimed at forming an orientation basis for learning a second foreign language in the context of learning a native language and a first foreign language.

The aim, object, subject and hypothesis led to the following research objectives:

- 1) to define the essence and content of the concept of 'grammatical interference' on the basis of the application of a rational approach in the study of several languages by university students;
- 2) to develop a model for overcoming grammatical interference and prepare appropriate teaching and methodological support based on the rational approach;
- 3) to determine the conditions that ensure the effective implementation of the model of overcoming grammatical interference based on the rational approach.

**Material and methods of research.** In the process of solving the tasks, the following research methods were used: analysis of scientific literature on foreign language teaching methods, psychology, theoretical and practical grammar of Ukrainian, English and German, typology of the languages under study; comparative and contrastive analysis of grammatical systems of the languages under study; questionnaire survey of students to determine their attitude to the developed methodology in the context of learning several languages; experimental training; methods of mathematical statistics in data processing and interpretation. The methodological guideline of the study is pedagogical approaches (rational, competence-based and communicative-cognitive) and linguistic approaches (textual, systemic and structural).

**Results and their discussion.** Interference (negative influence, negative transfer) is the replacement of the rule system of the language being learnt with another one built under the influence of the rule system of the mother tongue or the language learnt earlier (Bußmann, 1977: 213; Weinreich, 1976: 15). Studying the phenomenon of interference, O.O. Selivanova notes: 'Interference is a deviation from the standards of the native language, a speech error. Interference can cover all levels of language and can occur when an individual learns a non-native language or when there are long-term language contacts' (Selivanova, 2008: 211). Negative transfer (interference) occurs when one of the contacting languages is more familiar to the individual. After switching to the system of another language, the familiar grammatical, lexical and phonetic models continue to operate in the mind. The appearance of this or that type of interference, the influence of the native or first foreign language on the studied language has its own patterns, although their effect is not absolute, but probable.

Interference arising from the negative influence of the mother tongue and the first foreign language on the second foreign language covers all linguistic levels of the language. According to Coseriu (2002), interference can include: 1) deviations at the level of the language system; 2) deviations at the level of the language norm; 3) preference for certain foreign language features; 4) avoidance of certain foreign language features; 5) correct foreign language realisation at the level of the language system; 6) correct foreign language realisation at the level of the language norm.

F. Köhler (1975) offers another typology of interference errors: 1) replacement of a grammatical or lexical unit of the L1 language with an inappropriate unit in the L2 language; 2) intersection of L1 and L2 units, i.e. a grammatical or lexical unit of the L1 language is partially replaced by other elements in the L2; 3) divergence of L1 and L2 units, i.e. one unit of the L1 language corresponds to two or more units in the L2.

From the above classifications, it follows that the process of overcoming interference consists in analysing the relationship of structures and structural elements of several languages, their mutual influence, interaction and interpenetration to master the grammatical and lexical side of the language being studied. The peculiarity of the methodology of teaching a second foreign language is not the prevention of interference, but the need to ensure positive transfer.

By grammatical interference we mean a conflict process of interaction between language mechanisms caused by differences in the grammatical structure of the contacting languages and manifested in foreign language speech as a deviation from the grammatical regularities of a foreign language under the influence of the norms of the first and second foreign languages. In grammar, the direction of transfer depends on the level of formation of the grammatical structure. The deeper the structure is

in the linguistic consciousness, the greater is the influence of the native language. Thus, when studying predicative categories (tense, mood, and species), the source of interference is almost always Ukrainian as a mother tongue. At the superficial level of thought formulation (e.g. syntactic categories), transfer can be made from the first or second language to the third. In this regard, there are contradictions between the need to overcome various types of interference (including grammatical) in the shortest possible time in the process of learning several foreign languages (English and German) and the insufficient development of relevant methodological provisions. The development of the latter requires consideration of the main linguistic aspects of overcoming grammatical interference, which consist in the need to identify grammatical typological difficulties to create an indicative basis for the simultaneous acquisition of three languages – Ukrainian, English and German.

The linguistic aspect of the process of learning several languages is to analyse the correlation of structures and structural elements of several languages, their mutual influence, interaction and interpenetration at different structural levels of languages. The analysis of studies on the typology of learning Ukrainian, English and German shows that grammatical interference is manifested at the level of morphological and syntactic interference. The proposed table reflects the specifics of overcoming interference in the main cases of expressing the future tense when learning German and English by Ukrainian-speaking learners and includes possible typological difficulties typical for the process of learning this phenomenon (see Table 1).

Table 1

**Grammatical comparison and contrast table on the topic of expressing the future tense  
(‘+’ positive transfer, ‘-’ interference)**

<b>Speech function</b>	<b>Ukrainian</b>	<b>English</b>	<b>German</b>
1. Expression of action in the future	<i>Поїзд прибуває завтра о 7.00 (+)</i>	<i>The train comes at 7.00 tomorrow. (+)</i>	<i>Der Zug kommt morgen um 7.00 an. (+)</i>
2. Expression of a promise	<i>Я поверну тобі гроші завтра. (+)</i>	<i>I shall return your money to you tomorrow. (+)</i>	<i>Ich gebe dir das Geld morgen zurück. (-)</i>
3. Offer of help at the moment of conversation	<i>– Я не маю грошей. – Я тобі дам грошей (+)</i>	<i>- I have no money. - I shall give you money. (+)</i>	<i>- Ich habe kein Geld. – Ich gebe dir das Geld. (-)</i>
4. Expressing an intention to do sth. (with a high degree of certainty)	<i>Я збираюсь купити новий будинок. (+)</i>	<i>I am going to buy a house. (+)</i>	<i>Ich habe vor, mir ein Haus zu kaufen. (+)</i>
5. Expressing an assumption about an event in the future (with a low degree of probability)	<i>Я думаю, погода буде завтра хорошою. (+)</i>	<i>I think, the weather will be fine tomorrow. (+)</i>	<i>Ich glaube, das Wetter wird morgen gut sein. (+)</i>
6. Keeping records in a diary, daily routine	<i>О 5 годині я граю в теніс, о 7 я зустрічаюсь з другом. (+)</i>	<i>I am playing tennis at 5 o'clock, I am meeting with my friend at 7 o'clock. (-)</i>	<i>Um 5 Uhr spiele ich Tennis, um 7 treffe ich mich mit meinem Freund. (+)</i>
7. Expressing of planned actions of people that will definitely come true	<i>Мій брат приїжджає завтра, він уже купив квиток на поїзд. (+)</i>	<i>My brother is coming tomorrow; he has already bought a train ticket. (-)</i>	<i>Mein Bruder kommt morgen, er hat schon eine Fahrkarte für den Zug gekauft. (+)</i>
8. An expression of of long-lasting action in the future	<i>Я завтра буду здавати іспит з 9 до 12. (+)</i>	<i>I will be passing my exam from 9 to 12 o'clock tomorrow (-)</i>	<i>Ich werde morgen die Prüfung von 9 bis 12 Uhr ablegen. (+)</i>

Continuation of table 1

9. Expression of completeness of an action in the future	<i>Я завтра складу іспит до 12 години. (-)</i>	<i>I will have passed my exam by 12 o'clock tomorrow. (+)</i>	<i>Morgen werde ich die Prüfung gegen 12 Uhr abgelegt haben. (+)</i>
10. Expression of duration of an action in the future	<i>Я буду складати іспит протягом 2-х годин завтра. (+)</i>	<i>I will have been passing my exam for 2 hours tomorrow. (-)</i>	<i>Morgen werde ich die Prüfung innerhalb von 2 Stunden ablegen. (+)</i>

The methodology for overcoming grammatical interference should be based on the application of a rational approach, which involves the implementation of a comprehensive methodological system that includes an optimal combination of learning content, principles, methods, techniques, technologies, optimisation tools, learning conditions and diagnostic tools in order to achieve maximum methodological results at minimum cost in the process of learning several languages. In other words, a rational approach implies a desire to minimise costs in order to achieve maximum effect in learning activities. In the process of overcoming grammatical interference in the learning of German and English by Ukrainian-speaking students, the following aspects should be taken into account:

1) the most typical cases of grammatical interference and positive transfer, which are typical for the process of acquiring German on the basis of first English in the course of performing communicative and cognitive activities in a foreign language;

2) creation of a common cognitive base for the languages being studied;

3) common and differential features of the grammatical systems of the languages being studied;

4) selection of optimal rational strategies (planning, identification, forecasting, analysis, differentiation, interpretation, systematisation, generalisation, simplification, detailing, transfer, re-checking, etc.) in the process of overcoming grammatical interference;

5) patterns of real-life communication in the process of teaching the grammatical side, so that a foreign language acts as a means of social interaction;

6) creation of a dynamic educational environment taking into account the individual psychological characteristics of students, which involves choosing the optimal learning system with a focus on the individual characteristics of the development of mental functions of each student.

The most important condition for overcoming grammatical interference is the development of a set of exercises aimed at creating a unified cognitive base founded on comparative and contrastive learning of several languages. This set of exercises should be built with due regard to the grammatical difficulties caused by the presence of divergent grammatical phenomena in Ukrainian, English and German. It should include the following components of the process of teaching the grammatical side of language in English and German: ways of presenting grammatical phenomena, organisation of grammatical material, ways of training grammatical material, grammatical comments, comparative and contrastive grammar tables, reference grammar tables, rules, reference books, main types of grammatical exercises (reproductive, reproductive-productive, productive creative). The stages of overcoming grammatical interference when learning several languages are based on a system of exercises, the specificity of which is determined by the degree of grammatical skills.

There are three stages of overcoming grammatical interference. At the initial stage, the focus is on the use of grammatical comparatives in Ukrainian, German and English. The main role will be played by reproductive exercises, namely: identification exercises, grounding exercises, transformational exercises, exercises on construction, expansion of the grammatical structure, question and answer exercises, imitation and reproductive exercises, etc.



At the intermediate stage, the leading role is given to the use of supports in Ukrainian, German and English, but the set of exercises changes from reproductive to reproductive-productive exercises (based on a given grammatical material or a similar situation), training substitution exercises, training transformation exercises, training question and answer exercises, role-playing situational exercises, training reproductive exercises, training descriptive exercises, game exercises aimed at activating the grammatical material being studied.

The final polylingual stage does not involve the use of supports. The main role is played by productive creative exercises: exercises for solving problem situations, monological descriptive exercises, dialogical descriptive exercises, creative exercises for introducing new elements into the utterance, composition and project exercises.

Let us give an example of how grammatical phenomena are mastered through the implementation of a rational approach when studying the topic 'Word Order in German Compound Sentences'. Let us consider a set of generalised landmark features, which in a German compound sentence in postposition are as follows: 1) the subject, expressed by a noun or pronoun, comes after the subordinating conjunction in the complex sentence; 2) the auxiliary verb comes last.

After identifying the characteristic features of the landmarks, a grammatical support should be provided, which contributes to a clearer and more complete understanding of the structural features of the German compound sentence. The use of visual aids contributes to better memorisation of the word order in German compound sentences. At this stage, the students perform learning activities based on the use of comparison and contrast tables that demonstrate the peculiarities of word order in a complex sentence in German. Comparative and contrastive tables give a clear picture of the syntactic features of the German language, which allows the student to draw appropriate conclusions and generalisations on his/her own (see Table 2).

Table 2

**Comparative table 'Word order in a complex subordinate clause in German, English and Ukrainian'**

Language	Main sentence	Conjunction	Subordinate clause
German	Anna sagt,	dass	<i>sie ihre Freundin am Morgen <b>besuchen will</b>.</i>
English	Ann says	that	<i>she <b>wants to visit</b> her friend in the morning.</i>

You can start with subordinate complementary clauses with the conjunction *dass*. The teacher should emphasise that *dass* is only possible in certain types of sentences, including:

1) narrative sentences in indirect speech that tell what someone has said, heard or read: *Anna sagt, dass sie das Studium mag;*

2) statements with verbs that denote perceptions, mental activity, emotions, knowledge and desires: *Anna glaubt, dass ihre Eltern sie nicht verstehen;*

3) expressions with an adjective + *sein*: *Anna ist sicher, dass sie diesen Sommer nach Deutschland fährt.*

4) impersonal expressions: *Es ist wichtig, dass Anna einen Arbeitsplatz findet.*

The peculiarities of implementing a rational approach at the preparatory stage in the process of overcoming grammatical interference when learning several languages can be demonstrated by the following example: Form compound sentences based on the given vocabulary (see Table 3).

The next stage is functional and practical, involving reproductive-productive exercises. This stage involves training coincident and differential grammatical phenomena in German, English and Ukrainian. The teacher organises the teaching of the grammatical side of the language based on the use of monologue, dialogue and polylogue texts, the implementation of which is aimed at prevent-



ing and overcoming grammatical errors caused by interference. The use of comments and supports contributes to the creation of a cognitive base, consolidation of the studied grammatical phenomena and their transfer to the functional level. At the functional and practical stage, typical situations are used that require students to use the studied grammatical phenomena in an ever-changing communication context, which leads to the activation of the studied grammatical phenomena and facilitates the release of the grammatical phenomenon into oral speech.

Table 3

**Example of a reproductive exercise on word order in a German subordinate clause**

Subject	Predicate	Conjunction	Subject	Secondary members	Predicate
Wir, ich, du, er, sie, es, mein Freund ...	sehen, wissen [nicht], hoffen, erwarten; sicher sein; wichtig sein ...	dass	viele Studenten, dieser Student, diese Studentin, meine Freundin, du, er ...	in der Pause, in der Mensa, im Unterricht, auf dem Sofa, bei schlechtem Wetter, ins Kino ...	machen, lesen, essen, gehen, wiederholen ...

Let's take a closer look at the exercises used at the functional and practical stage. These exercises are the simplest type of situational exercises, where students have to complete a description of a situation (or expand on a situation) using the grammatical phenomena they have learnt:

German: *Lesen Sie den Dialog und ergänzen Sie ihn. Gebrauchen Sie dabei Nebensätze.*

– *Was machst du heute nachmittag?*

– *Ich hoffe, dass ich ins Kino gehe / Ich bin sicher, dass ich gleich nach dem Unterricht Hause gehe / Ich glaube, dass ich ein Buch lese.*

When doing this activity, you should draw an analogy with the corresponding word order in English, drawing students' attention to the free word order in English.

English: *Read the dialog und complete it. Use Future simple.*

*What are you doing this afternoon?*

– *I hope I'm going to the movies / I'm sure I'll go home right after class / I think that I'll read a book.*

Problem-based situational exercises are exercises whose exposition contains a task. Analysing the problem, students describe in detail the ways of solving this problem using the grammatical material studied.

German: *Äußern Sie Ihre Gedanken zum Thema, wie man Deutsch lernen soll.*

*Ich finde es gut, dass wir deutsches Fernsehen schauen.*

*Es ist wichtig, dass man jeden Tag Deutsch lernt.*

*Ich finde es richtig, dass wir neue Wörter immer im Kontext lernen.*

*Ich weiß, dass ich jeden Tag mindestens 10 Minuten Deutsch üben soll.*

*Es ist gut, dass man viele neue Medien beim Deutschunterricht benutzt.*

*Es ist wichtig, dass man keine fehlerhaften Strukturen lernt.*

When doing this exercise, you should draw an analogy with the peculiarities of using infinitive constructions in English.

English: *Give your opinion about learning German.*

*I think it's good that we watch German television.*

*It's important to learn German every day*

*I think it's right that we always learn new words in context.*

*I know that I should practise German for at least 10 minutes every day.*

*It's good that you use a lot of new media in German lessons.*

*It's important not to learn incorrect structures.*

The final communicative stage involves productive and creative exercises. This type of exercises involves the use and activation of the learnt grammatical phenomena within a certain situation on a grammatical topic. These exercises involve unprepared, spontaneous speech, so students perform the exercises immediately after receiving the task, and it is not recommended to use comparative grammar tables at this stage.

*Übung 1. Erzählen Sie Ihrem Freund aus Deutschland, wie das Erlernen der beiden Fremdsprachen (Deutsch und Englisch) sein Wissen erweitern konnte.*

*Übung 2. Interviewen Sie Ihre Freundin, wie sie Englisch gelernt hat.*

It is most efficient to conduct interviews in pairs, with one of the pairs presenting the results of their work to the whole group.

*Übung 1. Berichten Sie über Ihren ersten Tag an der Universität.*

*Übung 2. Erzählen Sie über die Schwierigkeiten beim Erlernen der deutschen Sprache.*

One of the most important conditions for communicative teaching of a foreign language is the creation of a favourable psychological atmosphere in the classroom that will stimulate students to engage in cognitive and communicative activities in a foreign language. In the process of interaction in a foreign language, students should satisfy their personal needs and interests.

The priority condition for the effective overcoming of grammatical interference is the maximum approximation of the educational process to real communication, during which the solution of language and thinking tasks is constantly becoming more complex. The involvement of students in the process of solving communicative language and thinking tasks based on the studied grammatical phenomena contributes to the creation of a single cognitive base when learning several languages. In the course of performing communicative tasks in a foreign language, a step-by-step implementation of cognitive activity aimed at mastering the peculiarities of the grammar of the languages under study is carried out.

The selected minimum of grammatical material should ensure the level of communicative sufficiency, i.e. enable students to fully participate in real communication. Therefore, when including grammatical material in the content of teaching the first and second foreign languages, it is necessary to evaluate each grammatical phenomenon in terms of the reality of its appearance in natural communication situations.

The priority condition for the implementation of the proposed methodological system is the use of an appropriate algorithm, which includes the following stages: awareness and identification of the grammatical phenomenon; analysis of common and differential features of the grammatical phenomenon in both foreign languages; prediction of possible grammatical difficulties; interpretation of the functions of the grammatical phenomenon in languages; systematisation and generalisation of the experience of the studied grammatical phenomenon; use of the studied grammatical phenomenon in real-life communication situations; re-checking the effectiveness of the use of the learnt grammatical phenomenon to solve the set communicative tasks.

In order to test the effectiveness of the proposed methodology for overcoming grammatical interference based on the application of a rational approach to learning multiple languages, an experimental training was organised with the participation of 2nd year students of the Faculty of Foreign Languages of Khmelnytsky National University who study English as a first foreign language and German as a second foreign language. The experimental training was aimed at solving the following tasks:

- to analyse and clarify the possibilities of applying a rational approach in the process of overcoming grammatical interference in the study of several languages at a university,
- to experimentally confirm the effectiveness of the proposed model of overcoming grammatical interference in the process of learning several languages based on the application of a rational approach and the corresponding algorithm for its implementation,

- to test the effectiveness of the developed set of exercises aimed at overcoming grammatical interference in the process of learning several languages based on the application of a rational approach,
- to test the methodological conditions necessary for the effective implementation of the methodology for overcoming grammatical interference in the process of learning several languages based on the application of a rational approach.

**I. The ascertaining stage** (September 2024):

At the ascertaining stage, the experimental work was aimed at solving the following tasks: 1) a multidimensional analysis of theoretical and practical experience in solving the problem; 2) conducting control sections based on the use of traditional teaching and learning materials; 3) developing recommendations for possible improvements to the existing system of teaching several foreign languages in order to overcome grammatical interference;

**II. Main Stage** (October-November 2024), whose tasks were:

- the implementation of new educational and methodological resources aimed at overcoming grammatical interference and their adjustment to improve the educational process, as well as testing the system of tasks, including grammatical contrastive-comparative tables and grammatical reference tables;

- testing the set of conditions necessary for the successful implementation of the proposed teaching model.

**III. Final Stage** (December 2024), whose tasks were:

- summarizing and systematizing the results of the research and experimental work;
- formalizing the theoretical and practical outcomes of the study.

An essential condition for conducting the research and experimental work was the development of criteria and indicators that determine the effectiveness and dynamics of overcoming grammatical interference in the process of learning multiple languages based on the application of a rational approach. The following key criteria and indicators of the effectiveness of the methodology for overcoming grammatical interference in the process of learning multiple languages using a rational approach were identified:

1. Motivational criterion with the following indicators: development of motivation for learning multiple foreign languages; motivation for learning a second foreign language.

2. Theoretical-content criterion (knowledge of general grammatical phenomena characteristic of the grammatical systems of German and English; knowledge of specific grammatical phenomena characteristic of the grammatical systems of German and English).

3. Operational-activity criterion (mastery of the operational-functional components of the grammatical phenomena under study; ability to apply grammatical phenomena in real communication situations).

To determine the motivational criterion, a survey was conducted. The questionnaire included the following task: *Mark the reasons that motivate you to learn multiple foreign languages.*

1. Knowledge of multiple foreign languages increases my chances of finding a job with a decent salary.

2. I believe that every modern person should know multiple foreign languages.

3. Knowledge of multiple foreign languages enhances my social status.

4. Knowledge of multiple foreign languages allows me to communicate with people from different countries in a foreign language (corresponding, listening to songs in a foreign language, etc.).

5. I enjoy learning about how different languages are structured (their similarities and differences).

6. I enjoy learning about the culture of the countries whose languages I study.

7. I want to know two or more foreign languages so that I can connect my future profession with foreign languages.

8. Knowledge of multiple foreign languages expands my opportunities for socialization.

9. Knowledge of multiple foreign languages will ensure my financial well-being.

10. Knowledge of foreign languages will help improve the educational level of my family (e.g., my siblings).

For each positive response, the respondent received 1 point.

To determine the theoretical-content criterion, students were presented with the table “Key Similarities and Differences in the Grammar of German and English.” To assess the operational-activity criterion, students were required to complete a grammar test and explain in German the formation, functioning, and usage of the most significant tense forms in the German language such as *Präsens*, *Präteritum*, *Perfekt*, and *Futurum I*. During the tasks aimed at assessing the formation of the operational-functional component of the studied grammatical phenomena, the following most frequent types of grammatical errors were identified among the students: errors in the use of tense forms, violations of word order in subordinate clauses, use of double negation, errors in the use of prepositions, mistakes in the use of definite, indefinite, and zero articles, etc.

Control assessments conducted at the diagnostic stage of the research and experimental work indicate nearly identical levels of formation of the identified criteria and indicators in the control and experimental groups (see Table 4).

Table 4

**Results of the Formation of Indicators for Overcoming Grammatical Interference Among Students at the Diagnostic / Final Stages of the Experiment**

Criteria and Indicators for Overcoming Grammatical Interference	Control Group (diagnostic → final stages)			Experimental Group (diagnostic → final stages)		
	Low	Medium	High	Low	Medium	High
<b>1. Motivational-Value Criterion</b>						
1. Motivation for learning multiple foreign languages	5 → 4 33 % → 27 %	6 → 6 40 % → 40 %	4 → 5 27 % → 33 %	5 → 3 33 % → 20 %	7 → 6 47 % → 40 %	3 → 6 20 % → 40 %
2. Motivation for learning a second foreign language	6 → 6 40 % → 40 %	5 → 5 33 % → 33 %	4 → 4 27 % → 27 %	7 → 5 47 % → 33 %	5 → 4 33 % → 27 %	3 → 6 20 % → 40 %
<b>2. Theoretical-Content Criterion</b>						
3. Knowledge of common phenomena of the grammatical systems of German and English	7 → 5 47 % → 33 %	5 → 5 33 % → 33 %	3 → 5 20 % → 33 %	7 → 2 47 % → 13 %	5 → 8 33 % → 53 %	3 → 5 20 % → 33 %
4. Knowledge of distinct phenomena of the grammatical systems of German & English	8 → 5 53 % → 33 %	5 → 6 33 % → 40 %	2 → 4 14 % → 27 %	8 → 1 53 % → 7 %	5 → 9 33 % → 60 %	2 → 5 14 % → 33 %
<b>3. Operational-Activity Criterion</b>						
5. Mastery of the operational-functional component of the grammatical phenomena under study	10 → 9 66 % → 60 %	3 → 3 20 % → 20 %	2 → 3 14 % → 20 %	11 → 3 73 % → 33 %	7 → 7 20 % → 40 %	1 → 5 7 % → 27 %
6. Ability to apply grammatical phenomena	11 → 10 73 % → 66 %	3 → 3 20 % → 20 %	1 → 2 7 % → 14 %	10 → 2 66 % → 20 %	4 → 8 27 % → 53 %	1 → 5 7 % → 27 %

The analysis of discrepancies in the obtained results involves comparing the distributions of observed values and calculating statistical correlations. In this study, the  $\chi^2$  (chi-square) test is used to determine the presence of consistencies or discrepancies between the frequency distributions of observed values (Levitsky 2012: 156). The data collected in the study were processed using a com-

puter program to create four-field tables, i.e., an alternative distribution. In this case, the degree of freedom is 1, and the critical value is  $\chi^2_{0.5} = 3.84$ .  $\chi^2$  sums exceeding 3.84 indicate that the experimental values surpass the theoretically expected ones. The  $\chi^2$  sum increases as the experimental values deviate more from the theoretical ones (Levitsky 2012: 158–159). The measure of the relationship between the obtained values was determined based on Chuprov's coefficient of contingency (K). The values of Chuprov's coefficient range from 0 to 1, and the significance of the obtained coefficient is established by the  $\chi^2$  value (Levitsky 2012: 156–160). Calculations of on the formation of indicators for overcoming grammatical interference among students at the diagnostic stage of the experiment were made separately for each criterion. The results of the calculations indicate that in both groups – control and experimental – the critical amount of  $\chi^2_{0.5} = 3.84$  is not exceeded for any of the phenomena under study. This means that the distribution of indicators in both groups is uniform. In other words: the level of motivation to learn a second foreign language, as well as the level of knowledge about common and distinctive grammatical phenomena in the systems of English and German and the ability to apply them in the control and experimental groups are approximately the same.

The results of calculations of the formation of indicators of students' overcoming grammatical interference at the final stage of the experiment are presented in Table 5. The calculations were made, as in the previous case, for each criterion separately.

Table 5

**Statistical Calculations of the Formation of Indicators for Overcoming Grammatical Interference Among Students at the Diagnostic Stage of the Experiment**

Criteria and Indicators for Overcoming Grammatical Interference	Control Group (students / %)		Experimental Group (students / %)			
	Low	Medium	Low	Medium	Low	Medium
<b>1. Motivational-Value Criterion</b>						
1. Motivation for learning multiple foreign languages		$\chi^2 = 0,11$	$\chi^2 = 0,13$		$\chi^2 = 0,48$	
2. Motivation for learning a second foreign language	$\chi^2 = 0,48$			$\chi^2 = 0,58$		
<b>2. Theoretical-Content Criterion</b>						
3. Knowledge of common phenomena of the grammatical systems			$\chi^2 = 0,09$	$\chi^2 = 4,32$ K=0,03		$\chi^2 = 0,07$
4. Knowledge of distinct phenomena of the grammatical systems		$\chi^2 = 0,15$			$\chi^2 = 4,13$ K = 0,03	
<b>3. Operational-Activity Criterion</b>						
5. Mastery of the operational-functional component of the grammatical phenomena under study	$\chi^2 = 5,00$ K = 0,04				$\chi^2 = 3,89$ K = 0,01	
6. Ability to apply grammatical phenomena	$\chi^2 = 6,40$ K = 0,05				$\chi^2 = 4,01$ K = 0,03	

The results of the calculations indicate the changes that took place in the experimental group. While the motivation to learn a second foreign language increased slightly:  $\chi^2 = 0.58$  (in the experimental group) as opposed to  $\chi^2 = 0.48$  and  $\chi^2 = 0.11$  (in the control group), the critical amount of  $\chi^2 = 3.84$  was exceeded for the theoretical and content and operational and activity criteria. Thus, the knowledge of common grammatical phenomena of German and English languages increased significantly for students with a low level of knowledge ( $\chi^2 = 4.32$ ; K = 0.03) and knowledge of specific grammatical phenomena of German and English languages for students with an intermediate level ( $\chi^2 = 4.13$ ; K = 0.03).

The indicators of the operational-activity criterion of students with low knowledge remained at the same level in the control group, and therefore differ sharply from the corresponding indicators of students



with low knowledge in the experimental group: the differences reach  $\chi^2=5.00$  at  $K=0.04$  for the mastery of the operational-functional component of grammatical phenomena and  $\chi^2=6.40$  at  $K=0.05$  for the ability to apply grammatical phenomena. This means that the increase in qualitative indicators was most significant in relation to the operational and functional criterion in the group of students with a low level of knowledge. A slightly smaller qualitative increase was observed in the group of students with an intermediate level of knowledge:  $\chi^2 = 3.89$  at  $K = 0.01$  for the mastery of the operational-functional component of grammatical phenomena and  $\chi^2 = 4.01$  at  $K = 0.03$  for the ability to apply grammatical phenomena.

The data obtained indicate that the level of motivation to learn a second foreign language has increased slightly, but the level of knowledge about common and distinctive grammatical phenomena in the systems of English and German and the ability to apply them in the experimental group has increased significantly compared to the control group.

**Conclusions.** The study allows us to draw the following conclusions:

1. The developed methodology for overcoming grammatical interference based on the application of a rational approach involves the implementation of a comprehensive methodological system that includes an optimal combination of learning content, principles, methods, techniques, technologies, optimisation tools, learning conditions and diagnostic tools in order to achieve maximum methodological results while minimising costs when learning several languages.

2. The developed model of overcoming grammatical interference should be based on the implementation of an algorithm that reflects the main stages of overcoming typological grammatical difficulties that arise in the process of interaction between the mother tongue, the first foreign language and the second foreign language. Such an algorithm includes the following stages: awareness and identification of the grammatical phenomenon; analysis of differential and common features of the grammatical phenomenon in the languages under study; prediction of possible grammatical difficulties; interpretation of the function of the grammatical phenomenon in the languages under study; systematisation and generalisation of the experience of the studied grammatical phenomenon; use of the studied grammatical phenomenon in real-life communication situations; re-checking the effectiveness of using the studied grammatical phenomenon to solve the set communicative tasks.

3. The proposed educational and methodological support, tested by experimental means, is aimed at overcoming grammatical interference in the context of learning several languages, is based on the consideration of common and distinctive features in the grammatical systems of Ukrainian, first foreign and second foreign languages and includes not only a system of exercises, but also a set of rationalisation tools (comparative grammar tables and reference grammar tables) reflecting the main typological features of the languages under study.

The main psychological and pedagogical conditions necessary to overcome grammatical interference in the process of learning several languages based on the implementation of a rational approach include: observance of a clear sequence of stages of the relevant algorithm; use of a system of tasks and means of rationalisation (comparative grammar tables and reference grammar tables) aimed at forming an orientation basis for learning a second foreign language in the context of learning Ukrainian and the first foreign language; involvement of students in real-life situations

The experiment has shown that most students have achieved quite high results in the practical mastery of the grammatical side of oral German. At the final stage of the experimental work, a cross-section was conducted to determine the formation of criteria and indicators that ensure the effectiveness of the proposed methodology based on the system of methods of a rational approach in the process of learning German as a second language on the basis of English by students whose mother tongue is Ukrainian.

Our study examines only some aspects of this problem. We consider it important to further develop in the following areas: studying the peculiarities of implementing various rationalisation techniques in the process of overcoming grammatical interference; in-depth study of the possibilities of applying a rational approach in the process of overcoming various types of interference.

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## THEORY AND CONTENTS OF JOURNALISM

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### DNIPRO WOMEN'S PERIODICAL "ROBITNYTSIA I DOMASHNIA HOSPODYNIA" (1926–1928) AS A GUIDE TO THE WORLD OF NEP FASHION

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**Abstract.** The present article examines publications devoted to fashion and clothing production featured in the supplement to the Dnipropetrovsk-based newspaper *Zoria–Robitnytsia i Domashnia Hospodynia*—between 1926 and 1928. The publications not only rendered global fashion trends adapted to the constraints of the totalitarian regime but also provided practical guidance for women on tailoring, sewing, and garment care. Additionally, the periodical covered the state of the sewing industry in the Dnipropetrovsk region and the development of clothing design education within the broader discourse of Ukrainization and modernization.

The analysis of the publications demonstrates that fashion was not merely a matter of style but also functioned as an instrument of ideological and cultural transformation for women in Soviet Ukrainian society. Articles on fashion trends, clothing production, garment care, and the development of the sewing industry, involving discussions on women's emancipation, reflect the socio-economic transformations of the Soviet period. These transformations were influenced by European capitalist democratic values during the Ukrainization of the 1920s.

The role of fashion journalism in shaping the national consciousness of Ukrainian women in the 1920s and its connection to global trends holds particular significance for reinterpreting Ukraine's cultural heritage.

**Key words:** fashion, fashion journalism, women's periodicals, *Zoria* newspaper, free supplement to *Zoria* (*Robitnytsia i Domashnia Hospodynia*, 1926–1928), anti-Bolshevism, Ukrainization, New Economic Policy (NEP), Katerynoslav (Dnipro), feminism.

**Introduction.** The study of the Ukrainian women's press, which was published during the era of Ukrainization and the New Economic Policy (NEP), is of great importance because it allows us to take a fresh look at the process of self-identification of Ukrainian women during the Red Terror and understand that the concept of identity remained nationalistic and focused on pan-European values despite being affected by the totalitarian era. Erasing the Ukrainian press legacy of the totalitarian era is a profound mistake. Such a legacy needs thorough reinterpretation to finally eliminate the pattern of provincialism and colonial thinking. In fact, fashion journalism was also peculiar to women's magazines of the totalitarian era. And it was the bridge connecting Ukrainian women with sisters from democratic capitalist countries and gave the proper guidelines for self-awareness in the world community. Thus, it is crucial to merge the shades of history of different regions of Ukraine, which were antagonistic for a long time given the historical and political realities. Based on the study of approaches to rendering fashion trends and their perception by the readership, it is possible to draw valuable conclusions about the actual state of the national consciousness of Ukrainian women during the Ukrainization of the 1920s. The article focuses on the consideration of fashion issues on the pages of the supplement to the Dnipropetrovsk-based newspaper *Zoria–Robitnytsia i Domashnia Hospodynia*—published between November 1926 and May 1928 (16 issues were printed in total).

**The purpose of the study.** The research aims to analyze fashion publications in the Ukrainian women's magazine "*Robitnytsia i Domashnia Hospodynia*" (1926–1928) in the context of Ukrainization

and the New Economic Policy; to study their impact on the self-identification of Ukrainian women in the eastern region and the formation of national consciousness under a totalitarian regime.

**Materials and methods.** The article studies the content of the Dnipropetrovsk women's magazine "Robitnytsia i Domashnia Hospodynia" for the period of its existence – 1926-1928. In the scholarly discourse, Ukrainian scientists have omitted the journal's existence and functioning. A little wider, i.e., in the geographical and cultural-historical context of the day, the topic was considered in their works by Andriushchenko, N.A. "Reflection in the Literature of the Evolution of Cultural Paradigms in the Dnipropetrovsk Region in the Second Half of the 1920s-1930s" (Andriushchenko, 2014:198), "Cultural Life of the Dnipropetrovsk Region of the 1920s – the Early 1930s (Based on the Materials of the Journal "Zoria")" (Andriushchenko, 2013:156); Arkhireyskyi D. V. "Chekist Katerynoslav (1920–1921)" (Arkhireysky, 2001:33); Hohokhiia N. "Women in the Soviet Sociocultural Space of the 1930s: Gender Aspect of Urbanization" (Hohokhia, 2004:379); Lazebnyk V.I. "Katerynoslav of the Modernization Era (1890–1914)" (Lazebnyk, 2006:259); Levitskyi V. O. "Development of Light Industry Branches in Naddniprianska Ukraine in the Second Half of the 19th – Early 20th Century" (Levitsky, 2017:78). The research methodology relies on the following principles: analytical, comparative, and comparative-historical methods, retrospective analysis, and genre-typological analysis. To evaluate the cultural and ideological context, it is applied an interdisciplinary approach combining history, cultural studies and gender studies.

**Results and discussion.** "Robitnytsia i Domashnia Hospodynia" is a free supplement to the newspaper "Zoria", a mouthpiece of the Katerynoslav Committee of the Russian Social-Democratic Labour Party (RSDLP). "Robitnytsia i Domashnia Hospodynia" was published from 1926 to 1928 in Russian, with its own numbering in the form of a separate journal. It is available in the funds of the V. I. Vernadsky National Library of Ukraine and Dnipropetrovsk Regional Universal Scientific Library named after the First Slavic Teachers Cyril and Methodius. Data on the supplement are introduced into scientific use for the first time since this printed mouthpiece has not yet been studied and covered in scholarly works by press experts. In total, 16 issues of "Robitnytsia i Domashnia Hospodynia" and 27 publications related to fashion and clothing production were published.

The period of the journal's functioning coincided with the era of Ukrainization. According to the 1926 address reference book "Katerynoslav Region", in Katerynoslav, which was renamed Dnipropetrovsk on July 19 of the same year, the Ukrainization of the communal services apparatus had begun on July 1, 1925. Thus, by the report time, it was Ukrainianized by 75%. The District Commission on Ukrainization was established on September 8, 1925, and 133 Ukrainization courses were organized in the district: of 4,058 students, 1,649 (40%) completed them. On average, state institutions were Ukrainianized by 30%, district executive committees – by 60-100%. As of September 1925, there were 73 courses with 2,001 students. Schools were 100% Ukrainianized, rural institutions – by 80-100%, hospitals – by 60% (Katerynoslav region: 1926 address reference book, 1926:282).

As a result, the publication of the supplement "Robitnytsia i Domashnia Hospodynia" in Russian was a temporary phenomenon. If it had not been prematurely closed due to the presence of materials with a bourgeois-nationalist hint, the journal would have switched to Ukrainian in 1928. In an article dedicated to the Press Day, the editor notes that "the circulation of journals in Ukrainian has increased significantly, but not enough. This shows that public interests and cultural needs of female workers, including housewives, are growing steadily." Therefore, it is evident how much women needed the Ukrainian-language press to develop their national interests (Printed publications day, 1928:4).

Regarding the editorial policy, the editorial board believed that "women are keenly interested in the issues of production and social life, child rearing, proper nutrition, and rational farming. The involvement of women in the press through their contribution to journalism is equally essential." Consequently, "although a small but consistent group of permanent correspondents from among



female workers” was rallied to work on the supplement “Robitnytsia i domashnia hospodynia”. They elaborated journalistic materials not only on narrowly feminine topics but also all spheres of industrial, social, and domestic life, not inferior to men. The editor praised the role of women in socio-cultural and journalistic realms: “It is impossible to carry out a cultural revolution without women. A woman has to fight every day to bring it to life. And she will be able to fight through active involvement into the press” (Printed publications day, 1928:4).

To understand the target audience of “Robitnytsia i Domashnia Hospodynia” and the role of fashion publications, we turn again to the 1926 address reference book “Katerynoslav region”. It states that according to the census of 1923, the population of Katerynoslav, Amur-Nyzhnodniprovsk, and Shliakhtivka was 73,325 men and 89,537 women, of whom 34.02% – workers, 27.14% – public servants, 13.04% – bourgeoisie, 6.2% – unemployed; by nationality: 42.5% – Russians, 32.2% – Jews, 13.8% – Ukrainians [p. 24]. Thus, given that “Robitnytsia i Domashnia Hospodynia” was a unique journal elucidating the women’s issue, at least a third of the indicated number of women (89,537) could be its subscribers (Katerynoslav region: 1926 address reference book, 1926:24).

When it comes to the state of the garment industry, Gubshveiprom, the Katerynoslav association of the garment industry, included a factory named after Volodarsky and shops in Katerynoslav, Zaporizhzhia, and Kryvyi Rih. In 1925, the factory had 104 mechanical sewing machines and 10 electric motors. The number of workers in 1923-1924 increased by 90%, in 1924-1925 – by 75%, and an increase by 25% was expected in 1925-1926. Production output was as follows: 1924-1925 – 17,952 conventional units; 1925-1926 – 60,000 units (an increase by 250%). Salaries grew from rub 51 in October 1924 to rub 74.8 in October 1925 (+47.5%). The cost of men’s coats decreased by 21%, trousers – by 7%, and underwear increased by 5% (Katerynoslav region: 1926 address reference book, 1926:125).

The modernization of the clothing industry was quite active, but the demand for making clothes at home did not disappear as there were expensive segments of the clothing range, e.g., underwear. Consequently, to save the family budget, it was more profitable for women to sew light clothes and underwear on their own. Therefore, if we analyze fashion publications in “Robitnytsia i Domashnia Hospodynia” (1926-1928), we can see that they can be divided into several categories following genre and topics.

1. Fashion news – sketches and descriptions of clothing models according to current trends: “Coats and Dresses of the Latest Fashion” (1926. No. 2, p. 8.), “Spring Fashion Season” (1927, No. 4 (6), p. 8), “Summer Fashion Season” (1927, No. 5(7) (71), p. 8), “Autumn Fashion Season” (1927, 8(10), p. 8.), “Winter Fashion Season” (1927, No. 11(13), p. 8), “A New Kind of Galoshes” (1927, No. 5(7), p. 5), “Spring Coats and Dresses” (1927, No. 2(4), p. 8), “Stars of Summer Dresses” (1927, No. 6(8), p. 8), “Fashion Corner” (1928, No. 2, p. 8.). Thus, it becomes clear that fashion in Katerynoslav (Dnipro) in the 1920s mixed rationality and restraint and focused on available materials and practicality, gradually moving away from military standards. Simple but elegant dresses with a combination of fabrics, bow pleats, and velvet belts were in vogue in women’s clothing. Woolen suits and jackets with an English collar dominated in business-style attire. Casual outfits comprised flannel and wool dresses, checkered patterns, and decorative buttons. Winter coats had fur collars and cuffs, spring – colored inserts. Men’s clothing remained classic with European influences: dark wool suits, military or working style shirts, and leather belts. Children’s clothes also had peculiar characteristics: boys wore suits with pants on the zippers, and girls wore dresses with pleated skirts and blouses with piping. As for fabrics, dressmakers actively used wool, flannel, cloth, drapes, and canvas. Gray, dark blue, brown, and black colors prevailed, for spring and summer – blue, red, and multi-colored patterns. From the drawings of dresses published in the supplement, it is evident that the most popular size was 48. It indicates a difference in then-beauty standards compared to the current one when the most common size is 44.



2. Women's emancipation and national policy. The journal also paid attention to women's emancipation in different countries. For example, photo notes "Turkish women are allowed not to cover their faces" (1927, no. 3(5), p. 7), "Unliberated" (1927, No. 5/7 (71), p. 6), "Down with the burqa!" (1928, no. 3, p. 2) reflect Soviet rhetoric on the "liberation" of women in the East. Materials prove the ideological impact that accompanied the fashion debate. The report on women in the garment industry "Needle and Shop-Window: "Dniproshveifabryka" (1926, no. 1, p. 4.) emphasizes their equality with men at work. It confirms a gradual change in gender roles in Soviet society.

3. Tailoring training and development. A photo note "In sewing circles" (1928, no. 2, p. 3) and M. Kurovska's article "On Topics of the Day: We Need a Handicraft School" (1928, no. 2, p. 7.) emphasize the importance of women's fashion education and hold Western European vocational schools providing women with thorough fashion training as an example. M. Kurovska noted that in Western Europe there were professional schools that gave women the opportunity to master the craft by vocation. In addition to cutting and sewing, they taught home economics, accounting, commercial law, drawing, anatomy, art history, and other disciplines. Students who wished to continue their studies could enter higher institutions to study in depth the quality of fabrics, history of costumes, chemistry of dyeing, and design basics. Such institutions aimed not only to train specialists but also to form the general education and artistic taste of future masters. The author stressed that Ukraine had to give up on outdated teaching methods and establish similar schools with training workshops. Female students would have to master not only cutting and sewing but also embroidery, making hats, artificial flowers, and papier-mâché toys. Lectures on history of costumes, materials science, and folk art would be equally important. The relevant school could be funded through the sale of workshop products and tuition fees for more affluent female students. Women needed that kind of education and hoped for its support (Kurovska, 1928:7).

4. Practical aspects of fashion and household advice. A special place in the supplement is occupied by notes devoted to fabric and clothing care that stresses a rational and pragmatic approach to everyday life, as follows: "Tips for Housewives: Wash-Fast Calico; Washing Wool Garments" (1926, No. 1, p. 7) and "Household Tips and Tricks: How to Remove Red Stains From Cherries or Wine?; How to Wash Colored Fabrics?" (1927, No. 7(9), p. 8), "How I Maintain a Sewing Machine for 2 Rubles" (1927, No. 6(08), p. 5.), "In the World of Household Chores: Dyeing Old Fabrics; Shoes for Autumn" (1927, No. 11 (13), p. 7.), "In the World of Household Chores: Washing Woolen Clothes" (1927, No. 6 (8), p. 7), "Practical Tips for Housewives: Wet Raincoats" (1927, No. 2(4), p. 7.), "In the World of Household Chores: Double-Acting Iron" (1928, No. 2, p. 8), "Useful Tips: Shoe Dirt Protector" (1928, No. 5, p. 8). The editorial staff's desire to teach female readers to use resources efficiently and save the family budget is evident.

5. Fashion in the context of Ukrainization and the light industry's progress. The period of 1926-1928 coincided with the active phase of Ukrainization and modernization of the clothing industry in Katerynoslav (Dnipro). At that time, the activities of Gubshveiprom, which united the Volodarsky Factory and the trading apparatus, were expanding. Production was mechanized and output increased that was reflected in the journal's articles. Publications, such as "Needle and Shop-Window "Dniproshveifabryka" (1926, No. 1, p. 4), informed about the gradual professionalization and modernization of garment production. This report tells us about the peculiarities of the modernization and electrification of the garment industry in Katerynoslav (Dnipro). For example, until 1926, "Dniproshveifabryka" was simply a sewing workshop in a cramped room on K. Marx Avenue. Subsequently, the enterprise became a modern factory with spacious, well-lit workshops equipped with ventilation. It comprised several workshops: men's, women's, white sewing, and trouser. The women's shop was particularly illustrative, where about 200 women worked. Once driven by hand, USA "Singer" sewing machines turned electrified. Transmissions allowed sewing machine operators to work faster, and workshop performance reached 1,400 units of outerwear per month. Contrary to

stereotypes, female dressmakers worked on an equal footing with men that even production managers recognized. In the white sewing department, technical improvements made the work even easier: the new machine sewed ten loops per minute, saving white seamstresses from myopia. The factory had three-store buildings and a trade union committee with active female members. Considerable attention was paid to the health care of female workers, and nurseries functioned for their children. Women earned 90–100 rubles, and white seamstresses – 50–60 rubles. Leaving the factory, a visitor could easily recognize its products in the urban environment: women in elegant jackets and coats were the living personification of the work of the seamstresses of “Dniproshveifabryka” (Ch.H., 1926:4).

6. Criticism of fashion trends. The note “Grimaces of Fashion Abroad: Long Pants Instead of a Skirt” (1927, No. 2(4), p. 5) renders the extravagant trends of Western fashion with an ironic implication. During NEP, fashion style reflected the level of well-being, which caused an ambiguous attitude of the Soviet authorities. The note “Mussolini Embarked Upon Fashion” (1926, No. 1, p. 3) demonstrates the realities of national fashion in Italy. The author of the article “On Foppery and the Ability to Dress Well” (1927, No. 6 (8), p. 5) criticized obsession with fashion but, at the same time, promoted “European” fashion for the Soviet woman: tidy, practical, but refined. The author raised the foppery issue because foppish young men sacrificed necessary expenses for books, health, or leisure to buy expensive clothes. The trend was becoming more noticeable among young public servants and workers: people skimmed on food to afford lacquered shoes or silk dresses. Foppery acquired particularly bizarre forms among women. In the bourgeois world, fashionistas ran to extremes, turning even to the style of wild tribes, such as tattoos or wearing nose rings. Although NEP followers had not yet adopted such habits, their influence was apparent: young female workers sought expensive attire, justifying it with a desire to dress well. However, the author stressed that dressing well does not mean spending the entire salary on fashions. Good taste and tidiness did not imply blind imitation of bourgeois habits. Excessive spending on expensive accessories undermines the financial situation and morally corrupts a person (Z.R., 1927:8).

**Conclusions.** The study of the publications in “Robitnytsia i Domashnia Hospodynia” (1926–1928) showed that fashion in Soviet Ukraine in the late 1920s was about everyday practicality and ideological impact. Analysis of materials proves that women’s press of that time played an important role in the modernization of society by contributing to the emancipation of women and their involvement in socio-economic processes. The journal oriented Ukrainian women toward global trends while adapting them to Soviet realities through publications on fashion trends, tips on cutting and sewing, and elucidation of the state of the garment industry and women’s emancipation. It informed about the processes of the light industry’s modernization, in particular the activities of Dniproshveifabryka, which used new technologies, including electrified sewing machines. Publications highlighted the growth of labor productivity and the active involvement of women in production, which encouraged their economic independence. It also focused on the need for professional clothing modeling schools based on European models. Comparison with Western European educational institutions stressed the need to introduce systematic training for Ukrainian women in sewing, design, and materials science.

Although it was printed in Russian, which was caused by the specifics of the then-language policy, the journal assisted in the formation of the national consciousness of Ukrainian women through an emphasis on the development of light industry, self-education, and everyday culture. The genre and thematic variety of publications proves the high social significance of fashion journalism, which also had an educational function in addition to popularizing style.

Thus, the study of fashion in periodicals of the Ukrainianization era allows us to better understand Ukrainian women’s cultural transformations and find similarities between the processes of self-identification of Ukrainian women of the 1920s and modern trends of national revival. The analysis of such sources is crucial for reinterpreting Ukrainian cultural heritage and overcoming stereotypes about the provinciality of Ukrainian fashion in the totalitarian era.

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## ELEMENTS OF INTERTEXTUALITY IN MEDIA NARRATIVES

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**Abstract.** The article examines the role of intertextuality in media narratives, with a particular focus on key elements such as reminiscence, allusion, paraphrase, collage, and hypertext, which facilitate the creation of multilayered messages capable of integrating media content into broader cultural and social contexts. A significant component of the study is the analysis of citations, regarded as one of the main tools for strengthening narratives by referencing authoritative sources, including classical literary works, political figures, and musical compositions. These references, in turn, lend additional weight and credibility to media messages. This approach underscores the importance of citations for the flexibility of media narratives, enabling them to adapt swiftly to changes in socio-political environments. Furthermore, special attention is given to how other elements of intertextuality, such as allusions and collage, contribute to the formation of new semantic connections that enrich media messages and enhance their versatility. This study highlights the significance of these tools in fostering cultural processes and civic consciousness in the modern information age, emphasizing the high social relevance of the topic in the context of contemporary media practices.

**Key words:** media, content, intertextuality, narrative, allusion, reminiscence, quote, paraphrase, hypertext.

**Introduction.** The study of intertextuality in the media is highly relevant today, as, in the modern information age, the media play a central role in shaping public opinion and influencing social and cultural paradigms. Intertextuality, as a key element of media content, not only deepens the understanding of interactions between texts and cultural codes but also enhances the effectiveness of communication processes. Media texts serve not only as instruments for informing the public but also as mechanisms for influencing consciousness, fostering civic engagement, patriotism, and social responsibility. Consequently, media narratives constructed from media texts function as tools for shaping public discourse, capable of influencing collective consciousness and supporting state-building processes. Simultaneously, these narratives shape how audiences engage with social challenges, creating a foundation for understanding national, cultural, and social values. Viewing media texts as multilayered structures that integrate verbal (language, text), audiovisual (sounds, images), and other non-verbal components, it is essential to highlight the critical role of intertextuality. This role involves the strategic use of quotations, reminiscences, allusions, and other forms of intertextual connections, which collectively ensure the depth and complexity of media texts, enhancing their effectiveness in influencing audiences. Thus, intertextuality in media texts is not only a tool for enriching the content, but also a fundamental component of creating high-quality media narratives and requires further scientific study as the basis of modern media communications.

**Main part.** The purpose of this paper is to examine the role of intertextuality elements in shaping civic consciousness and national identity, as well as to substantiate their use as fundamental tools for creating media narratives in contemporary media texts. This, in turn, aims to enhance the efficiency of media communications and foster the dynamic development of the media landscape. To achieve this objective, several specific tasks need to be addressed: to formulate the foundational principles of intertextuality by elucidating the essence of allusions, reminiscences, quotations, and other forms of intertextual relationships that influence media identity; to identify how intertextual elements con-



tribute to the mobilization of public consciousness and the reinforcement of national values through media texts; to analyze the ways in which intertextual elements are utilized to construct narratives that align with social and political needs.

**Materials and methods of research.** Addressing the outlined tasks necessitates a structured investigation of intertextual elements using various analytical approaches. These include semiotic analysis, which facilitates the examination of symbolic content in media texts, revealing cultural codes, sign systems, and their influence on audiences; psycholinguistic analysis, which enables the assessment of the emotional, cognitive, and behavioral impacts of intertextual elements; and the analysis of social and political discourse, which aids in identifying the role of intertextuality in shaping social narratives and supporting state-building ideas. However, the most critical method for identifying allusions, reminiscences, quotations, and other forms of intertextual relationships is content analysis. Content analysis provides a means to measure the frequency, typology, and functions of intertextuality, offering valuable insights into how intertextual elements influence audience perception.

In addition, to comprehend the meaning of media texts in general and the role of intertextuality within them, several sources were analyzed, including linguistic studies by A. Bell, T. Dake, M. Montgomery, N. Fairclough, and R. Fowler. Each of these scholars has made a significant contribution to the theoretical foundations and characteristics of media texts, viewing them as compositions that integrate verbal language with other forms of media communication, such as images, sounds, and video.

Among domestic researchers who have examined the structure, interpretation, and interaction of verbal and visual elements in media texts – and, by extension, mediated narratives – the works of M. Butyrina, S. Chemerkin, D. Dergach, D. Syzonov, and L. Shevchenko are noteworthy. These scholars emphasize that meaning in media texts is conveyed not only through linguistic elements but also through the integration of diverse media forms.

The theory of intertextuality has been extensively researched and developed by scholars such as R. Barthes, J. Derrida, M. Foucault, J. Genette, R. Jakobson, N. Piégay-Gros, and all of whom have made significant contributions to understanding how texts interact and generate new meanings through these interactions. In this context, N. Piégay-Gros characterizes intertextuality as a process in which one text overlaps or interacts with another to form an «intertext» – complex combination of multiple texts that converge within a single work (*Piégay-Gros, 2002: 49*). The interaction of different texts leads to the formation of intricate networks of meanings that expand the semantic boundaries of individual media texts, transforming them into multilayered narratives that shape content perception within the framework of existing cultural and social relations established by textual connections. This approach, in our view, warrants further elaboration because, as M. Shapoval notes in his manual «Intertextuality: history, theory», which explores various approaches to intertextuality, «today there is a tendency to ‘narrow’ the scope of intertextuality» (*Shapoval, 2013: 36*). This narrowing, in our opinion, constrains the understanding of intertextuality as a dynamic process of creating multilayered meanings that integrate cultural, historical, and social aspects into large-scale narratives. Such narratives, in turn, contribute to societal consolidation, the strengthening of national identity, and the comprehension of socio-political transformations.

**Results and discussion.** For a deeper analysis of intertextuality in media texts, it is essential to examine not only the mechanisms of interaction between texts but also the influence of associative connections, particularly those established through references to literary, historical, or cultural sources. In such cases, specific phrases, motifs, or images evoke associations with other texts or cultural contexts. This process facilitates the integration of media content (textual) into a broader cultural discourse while simultaneously stimulating the creation of new meanings.

Particular attention should be devoted to analyzing the key elements of intertextuality that most effectively influence audience perceptions within narrative content. These elements contribute to the



formation of ideas that shape social values and drive societal change. The primary elements of intertextuality include:

- allegory – conveys abstract ideas, moral principles, or philosophical concepts through specific images, plots, or situations. This approach facilitates the presentation of complex ideas by drawing on national history, mythology, or folklore, thereby fostering audience cohesion around shared values;
- allusion – enriches the media text with new meanings that may not be immediately apparent, encouraging intellectual engagement with the audience. Through subtle references, allusions provide additional opportunities for critical thinking by introducing alternative perspectives;
- autotextuality (author's style) – establishes interconnections between texts by the same author, creating a unified “textual field” or a form of metanarrative structure;
- collage – merges fragments of texts, images, stylistic elements, or other forms of media content from diverse sources or contexts into a single work. This technique fosters dialogue between cultures and eras, enhancing the understanding of both current and historical events. As a result, it stimulates recognition, association, and interpretation, encouraging public engagement in creating new, responsible interpretations of the presented information.
- hypertext – functions as a semantic «bridge» that facilitates logical transitions between different textual elements or content. It enables the integration of various sources of information, ensuring their holistic perception. Additionally, hypertext contributes to the democratization of information by providing access to a wide range of knowledge and materials.
- humorous turn of phrase – incorporates humor, irony, or satirical remarks to align the text with the cultural expectations of the audience. This approach reduces psychological barriers between the text and its consumer, making complex topics more accessible. In the media space, humorous expressions are particularly valuable for presenting serious issues in an easy-to-digest and engaging manner;
- paraphrase – allows for adapting content to new conditions, expanding its meaning and significance while preserving the main idea. It also creates new connections with other texts and contexts, fostering a sense of familiarity and recognizability, while updating or adapting already known ideas;
- reminiscence – encourages the unconscious or conscious reproduction of specific elements from another text, such as images, motifs, or stylistic features. This activates memories, associations, or interpretations in the mind of the media consumer, helping establish a deeper cultural context for understanding the information being broadcast. It is used to activate the collective memory of the audience, fostering a sense of familiarity by connecting the text to other known cultural or historical contexts (*Genette, 1997: 58*);
- quote – serves to confirm or reinforce an argument, enhancing its credibility by referencing well-known sources or cultural figures. This reinforces certain ideas and helps maintain narrative consistency, particularly within the context of state-building processes.

In view of the above, it should be noted that these elements do not constitute an exhaustive list of intertextual tools that can be used in media narratives. Architext, intertext, precedent text, pastiche, and parody are also important in creating state-building narratives. However, in our opinion, they are not a priority, and their use should be considered based on the specific context when analyzing a particular media text, which may be part of a broader social narrative. The absence of excessive detailing of intertextual elements in this paper allows us to avoid complicating the analysis with categories that are not always relevant to every individual case. Nevertheless, all of these elements play an important role in creating the ambiguity of media texts, enriching the process of narrative formation, and providing greater flexibility in their interaction with cultural and social contexts (*Chornovol-Tkachenko, 2006: 82-87*). Their use not only increases the impact of media content on the audience but also expands the boundaries of semantic connections, activating different levels of perception and interpretation.

In our opinion, the most convincing element of intertextuality that can serve as a basis for creating media narratives is quoting. It ensures the credibility of a media message by confirming certain

facts with authorities or sources recognized in society, thus raising the level of the narrative, giving it additional weight, and reducing subjectivity in the perception of information. In the media landscape, quotes from experts, politicians, or other public figures serve as a kind of «credit of trust» ensuring a balance between information manipulation and truth. According to the concept of an «authoritative source» this is a key point for the formation of a media narrative and its perception by the audience (Tuchman, 1978: 64). Furthermore, quotes in media content serve as an important tool of cultural capital. Their inclusion increases the persuasiveness, depth, and relevance of the media message, giving it reasoned authority, which enhances the impression of professionalism and knowledge of cultural codes and contributes to effective influence on the audience, especially in the context of information saturation and competition for attention. Therefore, quoting becomes not only a tool for reinforcing statements but also a strategic element in the formation of a media narrative that meets the requirements of the modern media space (Kalenich, 2022: 105).

Having analyzed domestic media content, we can identify several examples of quotational intertextuality, the use of which, in our opinion, is an effective means of building a narrative that resonates with contemporary social issues and shapes national consciousness. For example, Ukrainian media often use quotes from classic works of Ukrainian literature, which take on new meaning in the modern context. Phrases from Taras Shevchenko's poetry, such as «*If you fight, you will overcome*» and «*Learn from others, and do not shy away from your own*» are often quoted in the context of national revival, the struggle for independence, sovereignty, and freedom. These quotes become the foundation for modern narratives that speak of the heroism and resilience of Ukrainians in the face of war and social change.

In addition to quotes from famous poets, writers, and scientists, quotes from politicians play an important role in media narratives, especially in the context of military aggression, as they acquire new semantic meanings and serve as a tool for shaping the narrative. Political quotes can be used to reinforce media content that focuses on national identity, thanks to their ability to mobilize public consciousness and strengthen the nation's morale. For example, Valeriy Zaluzhny's quote, «*No matter how hard it is for us, we will definitely not be ashamed*» said during the war, has become a landmark for Ukrainians, as it not only reflects internal resilience but also emphasizes the moral steadfastness of the nation in the face of aggression (Chas.News, 2024). The use of this quote in media narratives creates an image of an unbreakable nation that, despite all the trials, will not betray its values and principles. The words «*there will be no shame*» highlight the importance of moral victory even in the most difficult conditions. The use of this quote in media messages can not only contribute to the creation of the myth of a heroic people fighting for their land and asserting their national and cultural dignity but also form a powerful image of a nation on the international stage that is fighting not only for territorial integrity but also for its moral and spiritual values. Thus, the use of such quotes helps to mobilize public opinion, support the morale of the population and contribute to the formation of a stable narrative that strengthens the unity of the nation in times of crisis.

Another manifestation of quotational intertextuality is music, which also plays an important role in shaping media narratives, as phrases from songs can be transformed into powerful socio-cultural signs that express emotions, ideas, and collective experiences. By adding additional meanings and depth to the lyrics and actively interacting with social processes and events, music acts not only as an aesthetic element but also as a national symbol. This allows us to form emotionally charged narratives that resonate with the deep cultural and social experiences of the audience. A prime example is the song «*Oh, There Is a Red Viburnum in the Meadow*» performed by A. Khlyvniuk and popularized by artists from different countries and in various languages. This song has not only gained popularity in the media in the context of Ukrainian national revival and the preservation of cultural identity, but has also become a symbol of Ukrainian resilience. Its lyrics are actively used in narratives that emphasize national pride, the struggle for independence, and solidarity in the face of external aggression. The

anthem of the UPA fighters has thus become part of media policy aimed at strengthening national unity and maintaining societal morale. Thus, music quotes are important components of media narratives, as they provide opportunities to transform personal and collective experiences into universal socio-cultural messages that actively interact with political and social realities. The ability of music to unite the public around significant narratives serves as a kind of cultural code, evoking associations with national ideals, historical events, and emotional states aimed at maintaining national identity, morale, and social unity.

All of the above highlights the significant role of quotational intertextuality in shaping media narratives and emphasizes the importance of its use. This element not only reflects the socio-political situation but also contributes to the consolidation of the nation in its ongoing struggle against the aggressor. The use of quotes in various formats, which resonate with national values and moral principles, can support public opinion and strengthen internal unity and solidarity – an essential factor in the current context of military conflict and social challenges.

**Discussion.** An important aspect of intertextuality theory is the use of language registers, which, in particular, the use of different stylistic means in socio-cultural and professional contexts, can significantly affect the effectiveness of communication, the formation of public opinion and identity, as well as how media messages are perceived. Language registers, reflecting varying levels of formality, emotional charge, and purposefulness in communication, are especially important in the media context, where the content of a message often depends on its adaptation to a specific audience and situation. These registers are powerful tools for building intertextual connections that activate associative patterns in the minds of the audience, contributing to a deeper understanding and emotional response to messages. Additionally, various stylistic elements often used in the media to emphasize certain ideas or emotions can carry cultural and social significance that varies depending on the context, thus affecting narrative formation. Through such use, the audience can be engaged in deeper social and cultural realities, increasing their identification with particular social groups or national ideals. It is important to recognize that the incorrect or excessive use of these tools can lead to manipulation of consciousness, distortion of facts, or the creation of disinformation narratives, which remains a serious issue in today's media landscape.

**Conclusions.** To summarize, the identification of key elements of intertextuality, such as reminiscence, citation, paraphrase, and hypertext, among others, helps us understand their role in multi-layered narratives that meet the demands of the modern media landscape and actively interact with social, cultural, and political realities. Quotations are particularly significant in the context of media narratives, as they refer to authoritative sources, such as works by classical literary figures or political leaders.

At the same time, intertextuality is not limited to the use of quotations. Other elements, such as allegory, humor, collage, and allusion, also play important roles in helping to integrate media content into broader cultural discourse and stimulating the formation of new semantic connections in the minds of the audience. This allows the media not only to reinforce existing ideas but also to influence social processes, shaping new social and cultural paradigms.

Thus, intertextuality serves as a vital tool in shaping media narratives, ensuring their flexibility and ability to respond to changing socio-political contexts. It creates multilayered messages that meet the demands of the information age and contribute to the development of culture and civic consciousness.

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## BUKTOK AS A PR TOOL: CONTENT APPROACHES OF VIVAT PUBLISHING HOUSE

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**Abstract.** The article examines the role of TikTok, in particular the BookTok platform, as an important PR tool for modern Ukrainian publishing houses, with an emphasis on the activities of Vivat Publishing House. The features of the content approaches used by the publishing house to promote its books among users of this platform are analyzed. It is determined that TikTok, due to its popularity among the youth audience, is becoming a powerful channel for creating the image of the publishing house, attracting new readers, and shaping trends in the book industry. Particular attention is paid to video content that uses the emotional factor to attract attention to publications, such as book reviews or subscriber surveys. The role of interactive elements that help strengthen interaction with the audience and increase reach is also considered. The study examines the impact of cooperation with book bloggers and influencers who actively work on the platform, as well as the importance of such partnerships for shaping the image of the publishing house. In addition, the effectiveness of using specific trends that can significantly increase the visibility of Vivat publishing house content among BookTok users is analyzed. The article emphasizes the importance of adapting traditional PR methods to modern digital realities. The results of the study allow us to draw conclusions about the effectiveness of BookTok as a tool for popularizing literature and improving the image of Ukrainian publishing houses in the international arena.

**Key words:** TikTok, PR strategies, content marketing, social media, influencers, book marketing, digital media, branding.

**Introductions.** In the modern digital environment, social media platforms have become key tools for content creation and promotion. One such platform is TikTok, which has quickly gained popularity among a wide audience, including youth, and has become an important tool for brands, publishers, and cultural projects. The significance of TikTok for publishers lies in its ability to influence reading preferences and shape new trends in the book industry through the creation of communities such as BookTok, which promote books among new generations of readers.

Today, TikTok is not only an entertainment resource but also a powerful PR tool that allows publishers to actively engage their audience and increase brand visibility. The platform provides publishers with the opportunity to create viral content that can reach millions of users, as well as interact with potential readers through short videos, reviews, book trailers, book challenges, and other formats.

This article examines the role of TikTok as a PR tool for the Vivat publishing house, specifically in the context of using the platform to shape and maintain the brand image through innovative content approaches. Various strategies and practices for promoting book products through the platform are explored, as well as the interaction between the publisher and influencers, as well as BookTok users. Studying these aspects provides a deeper understanding of how social media, particularly TikTok, can transform PR strategies and influence the development of book culture.

**Main part.** The aim of this study is to examine the process of using TikTok, specifically the BookTok platform, as a PR tool for promoting books from the Vivat publishing house, as well as to analyze the content approaches used to build the publisher's image among the youth audience. The objectives of this research include analyzing the type and popularity of content, as well as identifying key trends and methods used to attract attention to the books. One of the main tasks is to analyze the



role of interactive elements, such as video reviews, in the development of the BookTok community and their impact on the promotion of Vivat's literature.

For a detailed analysis of TikTok's use as a PR tool, the content analysis method was applied, which allowed the exploration of various content formats that create visibility for the publisher's brand and engage new readers. The social analysis method helped examine the role of the publisher's collaboration with influencers and book bloggers, as well as understand how social media shapes cultural trends in the book industry. An important aspect of the research is also studying how video content can enhance the publisher's image.

Additionally, the study explored the role of specific content strategies, such as emotional appeals and informative elements, which build audience attachment to the content. A content strategy that includes interaction with subscribers not only increases the visibility of posts but also influences the formation of deeper relationships between the publisher and readers.

The research also explored how BookTok can impact traditional marketing for the publisher and whether this channel could become the primary source of PR promotion for books. The study showed that successful use of social media platforms such as TikTok allows publishers to create significant visibility and interact with a broader audience.

As a result of the research, it was concluded that TikTok can be a powerful tool for promoting Ukrainian publishers, particularly Vivat, and plays a key role in developing modern PR strategies in the book industry. The use of platforms like BookTok, considering current content strategies, can positively influence the brand's image and ensure effective engagement with a youth audience. All of this happens in close collaboration with book bloggers who are involved in promoting the publisher.

**Materials and methods of research.** This study extensively draws on the works of recognized scholars, such as Merga M.K., Townend K., and others, who analyze the phenomenon of the TikTok platform and its impact on the literary process, particularly on the formation of the BookTok community. Scholars note that TikTok, especially its BookTok segment, contributes to the development of new social and cultural interactions, which have become crucial for the evolution of modern media platforms, particularly in terms of their influence on readers.

In the context of studying BookTok, the research by authors such as Dera, J., S. Brouwer, and A. Welling is crucial. They emphasize how videos on the platform can alter young people's reading preferences, particularly among school students, as well as the role of TikTok algorithms in shaping reading habits. They argue that such videos can increase interest in reading, even among those who do not have a habit of regular reading.

The study by Stewart S. examines the evolution of BookTok, especially regarding changes in genre preferences, when the popularity of literature shifted from young adult genres to dark romance, fantasy, and thrillers. This reflects changes in the demographics of users, which lead to shifts in literary trends on the platform.

Particular attention is given not only to the content promoted on the platform but also to specific practices, such as creating video reviews and recommendations that often emphasize the emotional experience of readers rather than an analytical approach to the text, as noted by Martens, M., G. Balling, and K. Higgason. This creates a new paradigm for literary discussions, which has significant implications for contemporary media culture.

Thus, this study adopts an interdisciplinary approach that combines media dependency theories, social media analysis, research on literary influences on young audiences, and the specific cultural changes brought about by the TikTok platform, particularly its influence on literary tastes and reading practices.

For a detailed analysis of TikTok's use as a PR tool, the content analysis method was applied, allowing the exploration of various content formats created by the publishing house to shape its brand and attract new readers. This method helps identify which types of content most contribute to the

popularization of books and the publisher's brand on the platform. An important role is also played by social analysis, which allows the study of how the publisher's collaboration with influencers and book bloggers impacts the popularization of books and the brand, as well as the formation of cultural trends in the book industry.

The social analysis method helps understand how the TikTok platform fosters new interactions between publishers, their audiences, and media figures, such as book bloggers and influencers, who actively influence the perception of books and the publisher's image.

These methods allow for a comprehensive evaluation of the effectiveness of using TikTok as a PR tool, particularly in the context of increasing the popularity of literary brands and forming long-term connections with the audience.

**Results and discussion.** TikTok, a platform owned by the Chinese conglomerate ByteDance, began actively conquering Western markets in mid-2018. Initially, its audience consisted mainly of Generation Z members, and the primary content focused on short humorous videos. However, TikTok quickly became a cultural hub for various subcultures, thanks to its unique algorithm that connects users based on shared interests and behavioral traits.

One of the most influential communities on the platform became BookTok – a subculture focused on literature. As noted by Merga (2021:5), the majority of BookTok users are aged between 13 and 27, although many do not disclose their age in their profiles. However, recent data from the United States and the UK show that the majority of the community is now made up of women aged 25-34 – indicating that the average user age has increased (Townend, 2024).

As of December 2023, the hashtag "#BookTok" had over 200 million views. Studies confirm that BookTok videos have a significant impact on readers' book purchasing decisions. This trend has prompted publishers and booksellers to adapt their marketing strategies to cater to the popularity of books on the platform. A characteristic feature of BookTok is the virality of literary works, many of which were published years or even decades ago. For example, Donna Tartt's «The Secret History» (1992) gained renewed popularity thanks to the "dark academia" trend. Madeline Miller's «The Song of Achilles» also achieved success in this way. Originally published in 2012 with a sales figure of about 20,000 copies, after the book went viral on BookTok, it sold approximately 10,000 copies per week in 2021.

Researchers note that the BookTok phenomenon contributes to a rise in interest in reading. In a study by Dera, J., S. Brouwer, and A. Welling (2023:107) conducted among 173 ninth-graders in the Netherlands, it was found that popular BookTok videos had a greater impact on students who were already interested in reading. Students who did not read often responded positively to such videos.

In the early stages of BookTok's development, the repertoire of its users mainly consisted of books targeted at young audiences, which aligned with the demographic structure of the community (Merga, 2021). However, in recent years, the share of young adult literature has gradually decreased, making way for genres such as dark romance, fantasy, and thrillers. This change could be linked to the rise in the average age of users on the platform.

Unlike the traditional literary canon, which is emphasized in education, the BookTok canon has its own peculiarities (Jerasa & Boffone, 2021:223). Maddox, J., and F. Gill (2023) note that new participants in the community need to familiarize themselves with the works of certain authors to stay aligned with BookTok trends. This creates a certain hierarchy within readers' preferences and the community. For example, authors such as Colleen Hoover and Sarah J. Maas are considered essential to keeping up with popular trends. Therefore, to fully integrate into the community, a minimum level of reading experience with these authors is necessary.

The BookTok canon not only fosters a sense of unity among its members but also serves as an important starting point for the platform's algorithm, which recommends books based on popular trends. These recommendations differ significantly from the traditional literary canon, which many

scholars classify as «classical», as they emphasize newer authors and genres with an "escapist" quality. Such genres include romance, romantic comedy, fantasy, and young adult literature, predominantly written by contemporary female authors (Stewart, S., 2024).

A study by Goodreads, one of the leading applications for tracking book popularity, shows that there has been a significant increase in the amount of romantic literature on the platform. Among 600,000 books analyzed, 216,830 were classified as romantic. Interestingly, the term "romance" as a literary category gained popularity thanks to Goodreads, after which it spread to social media platforms, particularly TikTok (Porter J.D., 2023).

One of the most popular subgenres of romantic literature within the BookTok community is fantasy. Examples of the most popular epic fantasy series include Sarah J. Maas's «A Court of Thorns and Roses», which regularly occupies top spots on romantic literature lists.

An important aspect of BookTok is its multi-faceted nature, combining oral text, written comments, musical accompaniment, and visual elements. This approach ensures a high level of interaction between viewers and the content. Users can like, comment, or share videos, and tag friends in posts, etc. As of mid-2024, the duration of videos created within TikTok was up to 60 seconds, while videos uploaded from devices could last up to 3 minutes – meaning they could be short yet informative (Merga). Recommended videos aim to encourage the audience to read new books. These videos are often created in the form of lists with titles such as «Books Worth Special Attention», «Best Books Released This Fall», or «Recommendations for Lovers». Another format is autobiographical, where the creator shares personal reading stories, such as «Best Dark Fantasy Books», etc.

Some recommendation videos are dedicated to a single book, bringing them closer to reviews. Review videos often focus on emotional impressions of the book rather than its rational analysis, which traditionally includes thematic or stylistic features of the text (Martens, Bolling & Higgason, 2022:716). The emotional aspect is key in BookTok reviews, making them unique compared to reviews on other platforms.

One of the tactile aspects of reading culture that has received significant attention in BookTok research is the phenomenon of «shelfies». This is a type of selfie where users showcase their bookshelves or specific book sections. As Dezuanni, M. L., B. Reddan, L. Rutherford, and A. Schoonens (2022) note, these images are often highly stylized: books are arranged in color-coordinated groups, or they are surrounded by decorations, jewelry, etc., creating a specific atmosphere and aesthetic for the books. In some videos, books appear against the backdrop of a collection of other books, which serves both as décor and part of the narrative. For example, a book may be carefully taken from the shelf or stack, with the focus on the cover.

In certain videos, the creator's hand holding a book might appear, or the process of choosing a book, flipping through it, or showing it with no text or voiceover. Sometimes text elements are added to highlight plot points or emphasize the specific features of a particular edition.

A separate genre consists of videos that focus on reading during travel. These videos resemble traditional vlogs, a long-form content format on YouTube. Unlike YouTube, where the creator usually speaks directly to the camera, TikTok allows for a more interactive experience. These videos show the process of choosing a book, reading it, and even thoughts after finishing it. Moments unrelated to reading, such as snacking or setting up a cozy environment, may also be added.

There is a genre where the creator narrates the story of a book from the perspective of a character, creating the impression that the events happened to them personally. The plot is presented dramatically, ending with the book's cover and the author's name. This is one of the few formats in which a physical book is not required, as the cover is used as a full-screen visual element.

As noted by Martens, Bolling, and Higgason (2022), reading on BookTok takes on a sensory and tactile form. Videos often feature the sound of pages turning, as well as images of comfort associated with reading, such as special chairs, pillows, or even stacks of books.

One particularly popular practice is «tabbing», where readers mark significant passages in a book using colorful sticky notes. Videos focus not on the content of these passages but on the result – showcasing decorated books. Research by Asplund, S. B., B. L. Egeland, and C. Olin (2024:642) confirms that such online representations influence real-life reading practices.

For Ukrainian publishers, platforms like TikTok have become essential tools in promoting new books, particularly among younger generations. One of the most notable examples of effective use of TikTok in this field is Vivat publishing house. By integrating into the youth segment, the publisher increases its audience reach. Books that gain popularity in Western BookTok are selected for translation, with several key factors determining their potential in the Ukrainian market. The first important criterion is the viral nature of the book on BookTok. Books that achieve significant popularity through active discussions and high view counts are more likely to be translated. If a book remains in trends for an extended period and is actively discussed on the platform, publishers consider it promising for Ukrainian readers. The second factor is the commercial success of the book in Western markets. Publishers assess how well a book sells in the US and Europe, as this is another indicator of its potential success in Ukraine. High sales figures in Western countries motivate Ukrainian publishers to acquire licenses for translation. Genre demand among Ukrainian readers is also important. Publishers consider which genres are currently popular in Ukraine and whether they match those trending in Western BookTok. If a book belongs to a genre well-received by Ukrainian audiences, its chances of being translated increase significantly. Accessibility of translation rights is also crucial. If rights to a book are available for purchase without restrictions, publishers can quickly decide on a translation. When rights are held by large international publishers, it can complicate the process, prompting Ukrainian publishers to turn to lesser-known authors whose books also have the potential to become popular after translation.

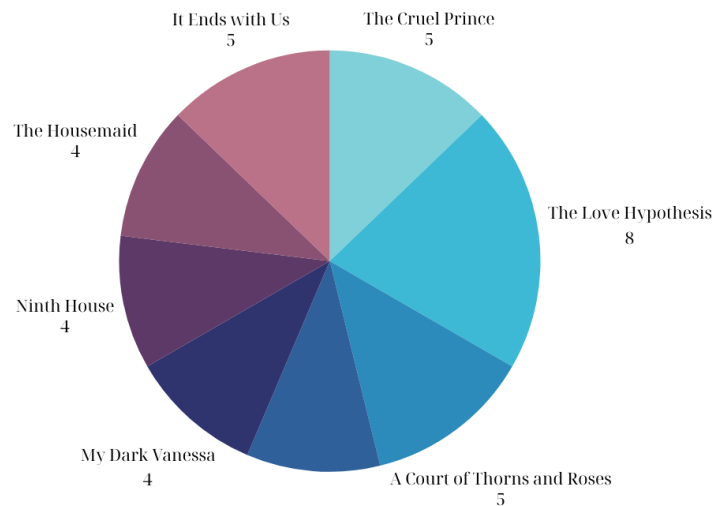
Overall, the selection of books for translation depends on a combination of virality on BookTok, commercial success in international markets, audience genre preferences, and the availability of translation rights.

In the study, it is important to highlight the publisher's page, the bookstore chains, and BookTok influencers who also promote the publisher.

In the study, it is important to highlight the publisher's page, the publisher's bookstore network, and also the book bloggers who talk about the publisher. Among the popular Book-Tok bloggers who dedicate a significant portion of their content to the publisher, the following 12 should be highlighted: ms.jilena, mari.inich, marislyshyk, viki.books, booknyta, cusomia, gavrish.nastya, loginirara, itsmeorlovska, bookfaity.ali, eslavasabio, and stepova\_rusalka. On average, videos about the publisher account for 2% to 6% of their content. Most of these are book reviews, either in the format of showing the book held by the creator or in a vlog-like format where the channel's author appears on video with the book.

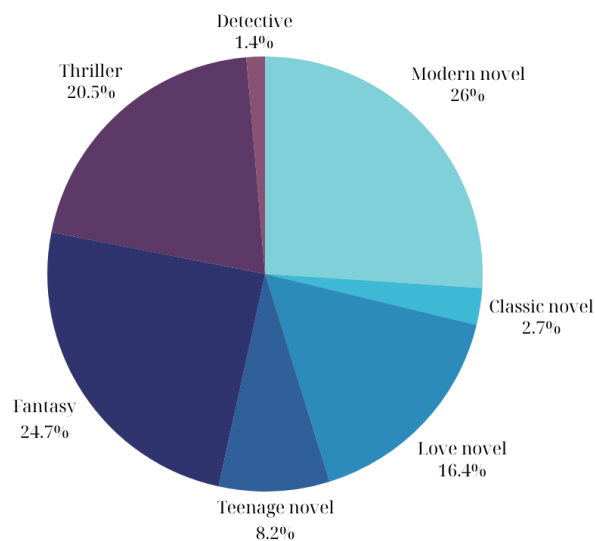
Some bloggers feature other video formats. For example, ms.jilena has videos about the book box «The Crystal Castle», exchanging Russian-language books at bookstores for discounts, and a «shopping at Vivat» format. viki.books has videos about promotions in the Vivat bookstore. loginirara has videos about «scary surprises from Vivat» for Halloween. bookfaity.ali features videos about bookstore openings (which is also present in stepova.rusalka's content), a selection of Vivat thrillers, and information about the “books by weight” promotion. Eslavasabio has a video on one of the most popular Vivat series, Ukrainian classics.

Books (8) that appear in a third or more of the selected bloggers' content were analyzed. These are among the most popular genres on BookTok, where fantasy books represent 3 titles («The Cruel Prince», «A Court of Thorns and Roses», «Ninth House»), romantic literature – 2 books («It Ends with Us» and «The Love Hypothesis»), and contemporary fiction – another 3 books (these are hard to categorize, except for «Housemaid,» which can be classified as a thriller; «My Dark Vanessa», «Tomorrow, and Tomorrow, and Tomorrow»).



**Diagram 1. Vivat books mentioned by several bloggers**

It is also possible to highlight the popularity of genres based on the mention of books in videos (across all bloggers, in percentage terms). The largest shares will be attributed to contemporary romance, fantasy, thrillers, and romance novels. These bloggers have a total of 73 videos, in which a genre can be identified.



**Diagram 2. Percentage of books of various genres among the content of selected book talkers**

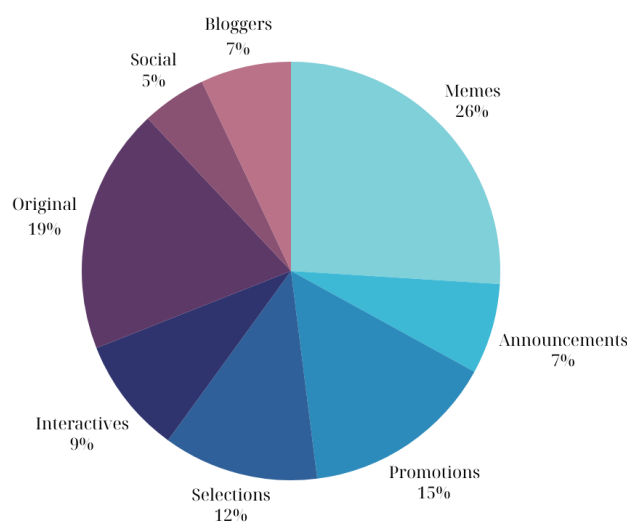
This further confirms the thesis about genre diversity, which leads to the conclusion that Vivat successfully targets the BookTok audience as one of its main target audiences. This can be supported by referring to BookTok book rankings.

The most illustrative is the Goodreads ranking of the most popular BookTok books, where 5 books published and translated by Vivat («A Court of Mist and Fury», «Six of Crows», «The Cruel Prince», «A Court of Thorns and Roses», «A Court of Wings and Ruin») appear among the top 10 out of a hundred. All of these are part of fantasy series, with three of them being part of the same series, A Court of Thorns and Roses.



When considering the entire list of books, 23 out of 100 were published by Vivat, which makes up about a quarter. This proportion becomes especially significant when considering that half of the books on the list have yet to be translated and published in Ukrainian. Therefore, Vivat's closest competitor, KSD, publishes fewer of the most popular TikTok books.

The TikTok accounts of Vivat are also worth special attention, with two accounts—one for bookstores and one for the publishing house itself. For analysis, 100 of the most popular videos were reviewed. Vivatbookstore has 11,000 followers and is run by blogger PROLIT, who has 30.7k followers on TikTok (and 36.1k on YouTube). The blogger mainly specializes in scientific and popular formats of videos about publishing houses. In general, the content of this channel can be divided into memes, promotions, announcements, interactive, recommendations, social actions, videos with bloggers, and also original formats that are hard to categorize elsewhere—specifically, scientifically popular information about books and authors.



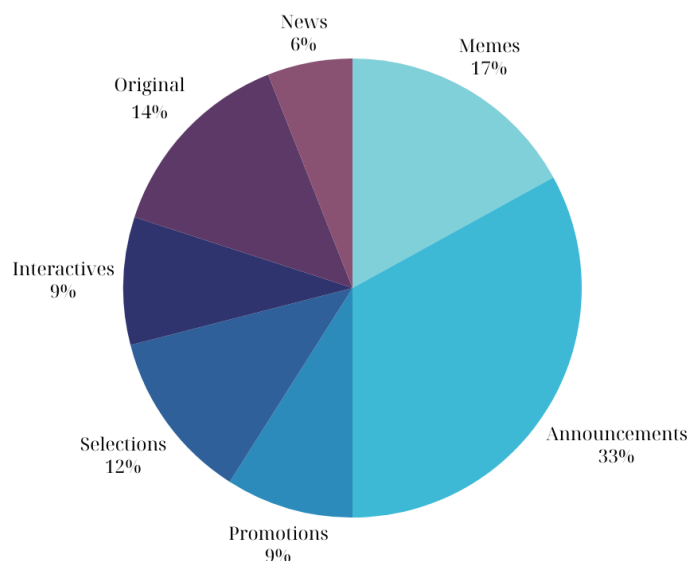
**Diagram 3. Distribution of content categories on the Vivatbookstore page**

The TikTok account of the bookstore is maximally targeted at the younger generation, which is the dominant audience. Accordingly, a quarter of all videos consist of viral content. Promotional videos, giveaways, and original content that is hard to categorize are also very popular. The popularity of such content once again proves that a light and casual presentation style is the most demanded among readers.

Vivat\_book is the publishing house's page, run by blogger booknyta (33.9k and 25.7k followers, respectively). She also provides book reviews of the publishing house, but they are not the dominant part of the content. There are several differences between this account and the previous one – more than a third of the content consists of announcements (this also includes preorders), while other types of content are approximately equally popular, with memes being the second most frequent.

In summary, it can be noted that the profiles have a clear division regarding the most popular content. They emphasize different aspects in their publication, which allows attracting new readers to the information field in an informal way (through memes) while also providing information about new releases and offers.

**Discussion.** Identifying changes in the strategic approaches to promoting Ukrainian publishing houses through the BookTok platform can be achieved using various methods and techniques, including:



**Diagram 4. Distribution of content categories on the Vivat\_book page**

**Content Analysis on BookTok:** This allows for identifying popular trends and changes in the selected content, which influences user feedback. Determining the most discussed genres and authors enables predicting which books will be in demand among Ukrainian readers.

**Monitoring Interactions Between Publishers and Bloggers:** This helps identify the most effective ways to engage with the audience. Recognizing successful collaboration models allows publishers to adapt their promotional strategies accordingly.

**Analyzing the Influence of Authors on Book Popularity:** It shows that on BookTok, the authors' personalities play a crucial role. This opens new opportunities for developing marketing strategies focused on building a strong visual brand.

**Evaluating BookTok's Effectiveness as a Channel for Social Responsibility:** By assessing how books addressing socially important issues receive feedback and support on the platform, it is possible to understand BookTok's role in shaping a responsible image for Ukrainian publishing houses.

By combining these methods, publishers can adapt their strategies to the realities of the modern media space and effectively use BookTok to expand their audience. It is also crucial that, through constant analysis of content and trends on the platform, publishers can optimize their approaches and improve the effectiveness of their promotions, focusing on what truly interests Ukrainian readers.

**Conclusions.** The use of TikTok as a PR tool for Ukrainian publishing houses, specifically Vivat, demonstrates the significant potential of this platform in promoting books to a young audience. The publishing house actively integrates into the popular BookTok segment, which allows it to significantly expand its reach and attract new readers. In selecting books for translation, Vivat focuses on the popularity of the content on the platform, particularly viral trends and commercial success in Western markets.

Special attention should be given to genre trends: fantasy, romance, and contemporary fiction have become the main genres that are popular among TikTok users and dominate the selection of books for translation. Books that are popular in Western markets (e.g., in the US or Europe) have a higher chance of receiving a license for the Ukrainian market. This is particularly true for books such as «The Cruel Prince», «Ninth House», and «It Ends wit Us» which are actively discussed on the platform.

Collaboration with popular BookTok bloggers is a crucial element of Vivat's strategy. Bloggers who frequently post content about the publisher's books help shape a positive perception among their

followers, contributing to increased sales and the popularization of new releases. Some of the most active bloggers creating content about Vivat books include ms.jilena, mari.inich, viki.books, loginirara, and others. Their reviews and videos announcing new publications or promotions add value to the brand and maintain interest in the publisher's products.

An analysis of the publisher's TikTok accounts, such as Vivatbookstore and Vivat\_book, shows a clear differentiation of content based on the audience. The Vivatbookstore profile actively uses viral content, promotions, and giveaways to engage the younger generation, while the Vivat\_book account focuses on announcements, pre-orders, and more formal content. This segmentation allows the publisher to effectively work with different audience segments and maintain high levels of engagement.

As a result, TikTok becomes an important tool for promoting Vivat's books, as it not only popularizes individual works but also shapes the brand image among young people. With the help of influencers who actively collaborate with the publisher, Vivat successfully attracts new readers and builds the popularity of its books in the Ukrainian market, focusing on current genre and cultural trends.

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## THEORY AND IMPACT OF PHILOSOPHY

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### EUROPEAN RATIONALITY: THE FOUNDATION OF CIVIL SOCIETY

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**Abstract.** The issue of ethical aspects of civil society has gained considerable attention in academic circles over the past two decades. A lot of studies on this topic have been created by philosophers, sociologists, and experts in the field of political and legal thought. However, despite the considerable scientific achievements, theoretical debates on the definition and theoretical foundations of the concept of civil society continue, as reflections on this topic remain extremely controversial.

The article emphasizes that against the background of significant contradictions between postmaterial and material values, European countries have been increasingly aware of the importance of mental and intellectual activity for the social structure of a person and ensuring a decent standard of living. The idea of creating a rational secular civil society, or social rationality, which involves organizing social life in accordance with the requirements of reason, is once again becoming relevant at a new level. One of the main achievements of twentieth-century philosophy was the recognition that rationality is the basis for activity in general, as well as for civic engagement in particular.

The analysis of the literature shows that the study of civil society is methodologically linked to the development of political rationality in Western societies. The aspects of the formation of the power of reason in the European social context are considered in detail.

**Key words:** consciousness, state power, power of mind, citizen, freedom, democracy, human rights.

**Introduction.** The socio-philosophical dimensions of the development and operation of civil society have long captured the attention of many influential thinkers throughout the history of European thought. Early theoretical concepts and models of civil society can be traced back to the works of Plato and Aristotle, Cicero and Marcus Aurelius, Augustine and Thomas Aquinas during the ancient and medieval periods. However, it was only in modern times, which marked the actual emergence and evolution of civil society in Europe, that theoretical reflections on this phenomenon in its various social, historical, and geographical forms began to develop. This issue became a central theme in European culture, shaping its intellectual trajectory.

In the seventeenth and eighteenth centuries, the idea of civil society was explored in British social and political philosophy. Thinkers like T. Hobbes and J. Locke provided in-depth analyses of civil society as a product of the discourse on freedom. A. Smith approached it through the lens of liberalism, E. Burke from a conservative standpoint, and T. Paine from a radical revolutionary perspective.

The works of the Scottish school, including notable contributions from D. Hume, F. Hutcheson, and A. Ferguson, also made significant strides in this field.

Following this, the French intellectual tradition began to explore the subject of civil society in depth, with philosophers such as S. Montesquieu, F. Voltaire, J.-J. Rousseau, and A. Tocqueville contributing to the discourse. France introduced Europe to the concept of the rule of law, rationalism, and, most importantly, the intellectual framework of the Enlightenment, which, with all its strengths and weaknesses, influenced European thought for centuries.

The ideas and images of civil society experienced a real renaissance in Germany at the end of the eighteenth century. Among the key thinkers of this period – I. Kant, J. Fichte, G. Hegel, K. Marx, M. Weber, M. Horkheimer, T. Adorno and J. Habermas – a number of prominent names stand out, who created original and significant concepts of civil discourse. However, it is paradoxical that most of these thinkers, except for representatives of the Frankfurt School, worked in a country where there was no civil society of its own, and instead a totalitarian empire was being actively built. At the same time, history shows that these ideas became the basis for the development of civil society in Western and Central Europe. In this context, it also becomes clear that without the integration of European values and ideas, the formation of civil society in Ukraine faces numerous difficulties.

Faced with this social challenge, Ukrainian researchers have been actively turning to the European intellectual heritage in the field of civil society since the 1990s. This is evidenced by the works of such authors as S. Grabovsky, O. Zabuzhko, S. Vovkanych, V. Lisovyi, M. Ryabchuk, I. Bychko, A. Bychko, M. Popovych, I. Dziuba, and others. The socio-philosophical and conceptual aspects of this tradition are thoroughly covered in the works of A. Karas, A. Loy, I. Pasko, and J. Pasko. However, even so, it should be noted that the issue of the conceptual basis of the European model of civil society remains insufficiently developed in the national scientific literature. The proposed article aims to help fill this gap.

The purpose of the study is to identify the key aspects of the formation of rational force in European society as an important theoretical tool for analyzing and understanding civil society.

**Methods.** The study uses methodological and theoretical achievements based on the concepts of «critical theory» and «communicative philosophy». Particular attention is paid to the application of the comparative method, in particular in its comparative and historical interpretation. This approach allows not only to analyze the commonalities and differences between phenomena, but also to reveal their development in different socio-historical contexts. This method allows us to better understand the nature of the phenomena under study, to trace the evolution of concepts in time and space, and to identify their influence on the formation of contemporary social and philosophical discourse.

**Results and discussion.** At the present stage, when there are discussions about various components, concepts, models and ideas about civil society, as well as its basic values, it should be recognized that the origins of modern realities should be sought in the Western European and Central European theoretical, moral and ethical heritage – the fundamental foundations of European culture and sociality. It is here that the first elements of a society, which later became known as a civil society, are born and formed.

In this context, normative principles of personal development emerge, and the ideas of culture, civility, and morality are embodied in the concept of human rights and dignity, gaining philosophical content and generalization. Further historical progress was also influenced by European ideas and realities, which in the twentieth century, against the background of sharpening civilizational and worldview contradictions, became increasingly ethically oriented.

In view of this, it is advisable to clarify the foundations of the phenomenon of civil society and reproduce the most studied discourses in the European tradition that directly relate to the cultural identity of the individual, the expansion of his or her freedom and authenticity.



The transformations that have taken place in Eastern Europe have forced both theorists and practitioners, journalists and researchers to reconsider established social and philosophical issues that were previously considered to be settled beyond question. This has pushed intellectuals to analyze the limitations of post-Soviet social science in more depth and to search for new axiological approaches, conceptual categories, and methods. For Ukraine, which, after the post-Soviet upheavals and due to the negligence of the political elite, almost ended up on the periphery of global civilization processes, turning to European experience in the field of social and civic issues is extremely important. This is especially true for that part of Ukrainian society that supports the ideals of freedom, democracy and human rights and seeks to implement the best European practices, adapting them to the needs of the country's modern post-industrial innovative development.

The need to find new ways of democratic development of society, moral guidelines and forms of social integration requires a gradual transition from an outdated, bureaucratic and inefficient model of social development to new, rational forms of social life. These forms should ensure positive changes both in the national context and in Ukrainian society in particular.

New decentralized forms of social activity based on horizontal networking between different social groups and strata play an important role in the process of postcolonial freedom and human rights expansion. They contribute to the restoration of social capital – civic trust, which is critical for the preservation of humanistic principles in society.

In a situation of imbalance of the main social institutions, ignoring the principles of justice, human dignity and social capital, there is a growing need to focus on discursive and ethical aspects, moral foundations that should contribute to civic development and the expansion of universal human rights. In recent decades, theoretical research has focused on the contradictions between the theory and practice of civil society, leading to an in-depth study of humanistic issues in Eastern and Western Europe. This is a natural process.

In the early modern period, the concept of civil society has important commonalities with the German term *Bildung* and the English term *Belding* (education as the formation of a personality and a process of conscious socio-cultural activity), as well as with the idea of the university, whose autonomy created a certain space of freedom in university cities in Germany and Great Britain. Thus, at the dawn of the new era, a unique social space, free public opinion, emerged around famous European universities and museums. It is important to note that education and culture as social capital have become key factors in the development of civil society as a real process of social evolution. It should also be emphasized that no organization, social group or corporation can claim to have a monopoly on representing the interests and needs of civil society. It is always in motion, and its interests cannot be assigned to certain classes or political forces. The openness of civil society cannot be monopolized, and participation in it must be constantly confirmed by democratic and moral principles, active life position and civic engagement.

The significance of the process of free civil constitutionalization for Europe becomes apparent if we consider the stages of development of this concept. In the theoretical constructions of German classical philosophy, this «idea is closely related to the ideals of the French Revolution, in particular, to the concepts of freedom, self-formation and self-management, including the management of society» (McLean, 2000: 112-113). The European understanding of civil society as a social alternative to state principles is of great importance for the overall European culture and social structure. It is important to note that civil society is a long-term civilizational process that cannot be fitted into a clear chronological framework. However, its development is closely linked to the spread of social heritage transmitted through education and upbringing. From antiquity to the Middle Ages, the foundations of modern conceptions of civil society were born, reflecting the social affirmation of innovative socio-cultural practices that emerge within and beyond politically organized structures. In this European socio-evolutionary context, the concept of extraterritoriality (self-separation) was laid

down in the early stages of social creativity, emphasizing the ability of autonomous associations and communities to organize, manage and exercise self-control.

Civil society in the European tradition has often been understood as a category of the ideal associated with notions of the proper. It drew inspiration for its formation from the sphere of values and social ideals that emphasized its independence from specific territorial frameworks and «carried it into the space of universal meanings or even global concepts» (Pietrzyk-Reeves, 2004: 72).

European social thought illustrates how intellectual activity became increasingly intertwined with social processes in the modern era. It is becoming more and more noticeable that the everyday life of people in different European countries develops, on the one hand, spontaneously and in the course of random events, and, on the other hand, is determined by institutional mechanisms shaped with the active participation of thinkers and intellectuals.

Since the 1970s, amidst a pronounced conflict between material and post-material values (as noted by Inglehart), European nations have increasingly recognized the significance of intellectual activity in shaping social structures and ensuring dignified living conditions for individuals. The concept of constructing a rational, secular civil society – often referred to as social rationality – has gained renewed relevance. This idea centers on organizing social life in alignment with the principles of reason. One of the key insights of twentieth-century philosophy has been the understanding that rationality underpins human activity in general and civic participation in particular.

An essential contribution in this regard is J. Searle's development of Aristotle's idea that «rationality is intrinsically linked to the capacity for free human choice» (Searle, 2001: 66). Western European philosophical discourse has played a critical role in elaborating on the nature of rationality and its connection to the socio-cultural and civic practices prevalent across various nations. Furthermore, a philosophical analysis of rationality in cultural practices can be grounded in the recognition of fundamental European values, which serve to uphold human rights, address individual needs, and protect societal interests. Rationality, in essence, reflects the capacity of an activity to effectively fulfill a specific social need with minimal effort. A need is considered rational if its fulfillment advances human freedom and social development; it is irrational if it lacks a meaningful connection to these goals or actively undermines them.

Rationality is emerging as a central guiding principle for diverse segments of European society, serving as a means of intellectual resistance for communities that have endured the irrational excesses of communist regimes. These regimes sought to dismantle the genuine dimensions of human existence, including the symbolic realms of culture, society, and individual life. The principle of rationality holds particular significance as it continuously assesses the extent to which civil society aligns with the values of reason, genuine meaning, and legitimacy. This principle encompasses not only a conceptualization of social reality shaped by the theoretical frameworks of Western philosophy but also emphasizes the legitimization of reason within social structures. On a practical level, rationality becomes a benchmark for establishing a democratic social order. It guides the functioning of civil society as a distinctive system of reasonable interaction, facilitating cooperation between individuals and social groups while upholding democratic principles.

The decision of Western and Central European countries to pursue a legal framework for social development played a pivotal role in establishing reason as a fundamental social factor equipped with the tools to influence social reality. Reason emerged as the driving force behind societal progress and the guiding principle for optimally meeting the needs and interests of society, with freedom recognized as an inherent human right. It became the cornerstone of civilization, shaping the key imperatives of civil society and the market. Reason serves as a unifying factor that enables the effective development of social institutions. It fosters a unique system of interaction among individuals, groups, and social strata, aligning their diverse aspirations and expectations while maintaining equilibrium within society. Modern perspectives emphasize the importance of a rational approach to

limiting state interference in the rights of individuals within civil society, recognizing this as essential for creating a dignified social framework.

The concept of freedom – both in civic and personal choices – stands as a core aspect of rationality. In practical terms, it underpins active participation in public and private life, forming the foundation of the European tradition of civil society.

The socio-philosophical understanding of civil society has historically and theoretically been linked to the adoption of political rationality as a methodological framework within Western European social philosophy. This issue is prominently addressed in the works of thinkers such as M. Foucault and J. Habermas. The French philosopher first delves into the challenges of political rationality in his early scholarly work «The History of Madness in the Classical Era» in 1961.

Foucault emphasizes the interconnectedness of various forms of human experience – such as madness, illness, lawbreaking, sexuality, identity, and the fields of psychiatry, medicine, criminology, sexology, and psychology – with a complex power system designed for comprehensive control over both individual and collective behavior. Central to his argument is the belief in the pervasive nature of power structures within European civilization, alongside the historical instability and fragmentation of civil society in this context. He highlights how «Western civilization has developed the most intricate power mechanisms rooted in an extensive system of knowledge» (Foucault, 1978: 44). In this framework, Foucault explores the interplay between disciplinary forms of power, which gained prominence starting in the Middle Ages, and various manifestations of subjectivity. This includes the «genealogy of the subject,» which he sees as foundational to the emergence of a society free from totalitarian domination.

It is evident that the application of political rationality in public life has roots extending back to the Middle Ages. The Christian pastorate historically incorporated various methods for exercising control over its congregation, including personal knowledge of parishioners and insights into factors that influenced their spiritual growth. To strengthen its influence, Christianity from the 12th century began integrating two pagan practices originating in the Hellenistic period, reinterpreting them through a rational lens. These practices include the «examination of conscience» and the «guidance of consciousness,» both of which had been utilized by the Pythagoreans, Stoics, and Epicureans in their socio-historical traditions.

In line with this tradition, it was believed that personal self-improvement should be subject to continuous oversight and discipline by the ruling authority, which systematically evaluated both virtuous and wrongful actions. Another related practice involved providing general guidance by those in power to their subjects during particularly challenging situations.

The Christian pastorate merged these two practices into a unified approach. The «guidance of consciousness» was deemed an essential and ongoing requirement for a God-centered society, as the Church constantly sought to combat the sinful behaviors prevalent in the secular world. Over time, however, the Church began integrating the practice of «examination of conscience» into public life. The openness of the confession process shifted focus from individual introspection to the capacity of the human soul to reveal itself and submit to the authority of its confessor.

Another significant transformation of the pastorate can be identified in the adoption of Christian practices of confession and humility. The integration of Christianized methods, such as the examination of conscience and the guidance of consciousness, into both sacred and secular life served a clear rational purpose: fostering spiritual submission to ecclesiastical authority by eradicating the sinful, carnal nature of humanity. «The Christian pastorate introduced elements of a peculiar system that diverged from the traditional political community, which relied on the contributions of its citizens for survival. Despite this, its practices contained fundamental aspects of rationality. Rationalism, as a core methodological principle of medieval culture, found consistent application in the domain of canon law. Instead of relying on precedent and custom, the supreme guiding

principle became the concept of justice – a moral and legal alignment of rationality with truth. This approach established a clear hierarchy of legal norms and principles, the interplay of which remains a critical component of contemporary legal and civil thought» (Foucault, 1967: 69). It is particularly intriguing to examine the historical evolution of the concept of rationality, especially in the context of political rationality.

One of M. Foucault's significant works addressing the issue of political rationality is his lecture «Omnes et Singulatim: Toward a Critique of Political Reason», delivered at Stanford University on October 10 and 16, 1979. The key arguments presented in this lecture highlight a gradual shift in Foucault's socio-philosophical focus, moving from the disciplinary aspects of power to the interplay between ethics and power. This shift aligns with the ethical challenges of civil society and the broader context of societal emancipation from totalitarian practices characterized by hierarchical subordination.

The French philosopher underscores that, starting in the seventeenth and eighteenth centuries, power began to be analyzed increasingly in the comparative frameworks of norms and discipline. He adopts a critical stance toward disciplinary power, which contrasts sharply with the socio-historical practices of statism and cameralism. These systems emphasized the necessity of state intervention in both public and private spheres of citizens' lives. Foucault also directs attention to a new form of power – biopower – which he identifies as a comprehensive mechanism of control over all aspects of civil society. This form of power, as Foucault argues, became a defining characteristic of Western societies during the technical and industrial revolutions of the modern era.

According to this theoretical framework, the modern era represents a reinterpreted continuation of earlier forms of power, from Antiquity and the Middle Ages. One form of power, embodied by the Polis, gradually evolved into the theory of state interests and police authority, while the other, rooted in pastoral power, transformed into a system of state patronage and societal discipline. This transformation is seen as a manifestation of political eudemonism, characterized by trends that oppose civil society, such as patronage-client relationships, where the monarch is held responsible for the happiness and well-being of his subjects.

Foucault thus understands the political rationality of Western societies as a complex interaction and mutual influence of two models: the Western Greek polis and the Hebrew pastorate, which underwent several changes – moving from the polis to political centralization and the development of modern concepts of state power. He emphasizes the formation of two interconnected concepts: «state interests» and «police theory», which contribute to the emergence of a new political philosophy, providing a detailed account of the development of Western political rationality.

The rational theory of state interests delineated the principles and methods of secular governance, allowing a distinction to be made between state administration and the canonical framework, according to which God rules the world, the father governs the family, and the leader oversees the community. On the other hand, the «Theory of Police» functioned as a complementary tool, helping to define the nature of the state's rational activities and the objectives it aimed to achieve.

According to this theory, state interests are realized through an instrumental managerial approach that follows specific, well-defined rules. This approach impacts not only customs and traditions but also the core principles of rational governance in society. The essential argument put forth by Foucault, Habermas, J. Gregory, and other scholars is that the concept of state interests, which became ingrained in the public consciousness of European nations in the seventeenth and eighteenth centuries, represents a model of rational political management. It transforms the earlier understanding of the two communities – Civitas Dei and Civitas Terrena – which historically embodied a dialectical unity between the sacred and the secular.

The new model of governance largely diverges from the medieval political perspective, which is notably represented in Thomas Aquinas' famous text «On the Rule of the Kingdom of Cyprus». As is



well known, Aquinas emphasizes that in order for the art of governance to be considered reasonable, or «rational, it must mirror the operations of nature itself» (Aquinas, 2000: 234).

According to this medieval understanding of rationality, the royal administration of a secular state must replicate the divine management of nature, with the spiritual principle taking precedence over the physical. This classical text primarily addresses the Church's demand to secular institutions for the necessity of absolutist power to adopt the canonical model of world order, which involves teleological principles and mirrors the divine regulation of both the body and the soul. In this framework, «mankind requires someone who can guide them toward eternal happiness» (Aquinas, 2000: 327).

The concept of state interests, as realized in the social practices of the «princely states of the common good» and the Mediterranean Italian commune republics, fundamentally rejects the canonical element and instead emphasizes the «practical dimensions» of managing a normative state. These practical principles, which represent a clear break from the theological model of political rationality, laid the groundwork for the political legitimacy of state intervention in public life. The enduring legitimacy of «police theory» within the public consciousness of various social groups reflects significant shifts in both theoretical discourse and political practice within Western European society during the Early Modern period, particularly in the seventeenth and eighteenth centuries. These shifts were embodied in new socio-historical and political practices, including mercantilism, evolving relationships between power and civil society, and the development of new academic disciplines such as «administrative management science», which was taught at German universities under the name «die Polizeiwissenschaft», or «science of the police».

In his analysis of political thought within the historical context of the German principalities, Yu. Justi highlights that the new system of specialized education, prevalent in nearly all German-speaking universities (especially in Göttingen), not only facilitated the discipline and practical training of bureaucrats in Prussia, Austria, and Russia, but also laid the groundwork for a eudaimonic interpretation of the state. This interpretation stands in contrast to the concept of civil society. It focuses on the creation of a rational institution of the secular state, which is responsible for the moral well-being of its citizens. This institution takes on a new disciplinary role – the state as a police apparatus that oversees and nurtures its citizens to promote the common good. Clearly, such an institution opposes civil society and cannot be seen as one that challenges the state. The concept of «civil society» effectively dissolves into the notion of «population», where individuals are viewed merely as objects to be managed, reduced to mere agents of the state's interests.

This form of political rationality, which is reflected in the distorted relationship between the state and civil society, gains legitimacy through a wide range of socio-political and philosophical writings. Specifically, Yu. Fon Justi clearly articulates the extent to which society depends on the state, stating that «the lives of individuals in society are subject to the police interests of the state» (Justi, 1972: 121). In the perspective of the 18th-century German theorist, the police play a role in stimulating mutually reinforcing processes: they ensure the preservation, continuation, and improvement of the lives of citizens, which in turn strengthens the state.

According to Justi, this paternalistic model of governance, which combines elements of the polis and the pastorate, shifts the focus of civil society issues. It redefines the concept of «citizen», turning it into that of a «client» of the state. As a result, society is treated as an object of state control. For several centuries in European countries, particularly in the German states, the concept of citizenship was largely absent. Individuals were seen as subjects of secular supreme authority, while the population was viewed as an object of police oversight, clearly embodying the repressive rationality of state power.

In this context, both I. Kant and, later in the twentieth century, M. Foucault and J. Habermas, critically examine this model of political rationality, leading to what is described as the «complete totalization of society» (Habermas, 1991: 33). It is noted that the form of political rationality embod-



ied by the state, as a complex overseer of societal actions, is not inherent to Western rationality in its authentic form. Instead, it necessitates the incorporation of Kantian social philosophy, which «limits the functions of state power to the legal principle guiding societal development» (Kant, 1997: 214).

The foundation for the rational functioning of civil society lies in the legal principle, which Kant, often referred to as the «author of the three critiques», identifies as the embodiment of reason. It is believed that «where an individual recognizes the possibility of practically realizing this legal principle as the principle of reason, rights are established, and these rights become a fundamental foundation for a society of civilized citizens» (Kant, 1998: 112). Kant's perspective forms the basis for "practical philosophy," which connects to themes of civil justice, culture, and civilization – concepts that align with morality, as they are essential to human existence within civil society. For Kant, a critical and foundational indicator of human existence is the ability to assert and maintain oneself as a person and a subject of civil society, endowed with reason. Through Kant's framework, reason is legitimized within European forms of social life.

Thus, German classical philosophy emphasizes the issues of morality, culture, and civilization as crucial elements in the formation and evolution of civil society.

**Discussion.** This concept, which aligns with the needs and aspirations of a free society, has a solid theoretical foundation that integrates various interpretations of both past and present. In contemporary terms, it encompasses culture, society, and the individual, who must resist all forms of subjugation and oppression, creating resistance against the influence of the «system». However, in the era of globalization, modern civil society must also account for the demands of the «system's» mediators, such as power and capital, which have continuously impacted the individual's life world throughout the twentieth century. At the same time, it is essential to preserve the normative and ethical dimensions of the life world, as well as the communicative nature of civil society. In its most favorable expressions, these features foster the growth of democratic sociality, ensuring human well-being and dignity. Ideal European models of civil society are marked by the continuous development of the moral resources of society – social capital – evidenced by high levels of trust, solidarity, cooperation, mutual respect, and justice. The revitalization of the moral and cultural aspects of life and social capital has become a critical factor in the restoration of civil society in Central and Eastern Europe.

The development and practical establishment of the normative dimension of civil society were accompanied by the recognition of reason as the central social factor that facilitates a unique system of horizontal interaction between individuals, social groups, and strata, while limiting state interference in human rights. Reason thus forms the basis for democratic aspirations for self-governance and plays a key role in legitimizing diverse approaches and discourses on civil society grounded in the principle of law.

Simultaneously, alongside the practical assertion of universal human rights – political, civil, and social – an intense debate unfolds between Marxist ideology, which denies the ethical aspects of civil society, and antinomian concepts that propose a radical democratic alternative to existing forms of distorted sociality and unfreedom. This is particularly evident in «critical theory», which is not confined to a single discourse but instead synthesizes various approaches. In broad terms, it views civil society as a normative institution aimed at overcoming alienation among people and increasing their sense of responsibility toward themselves and the common good.

**Conclusions.** The paradigm of civil society should be based on the principles of individual freedom, equality and self-sufficiency. The formation of civil society, according to I. Kant, is a movement towards fuller realization of the legal norms of freedom and equality of citizens, and the approach to eternal peace.

The German thinker associates the functioning of civil society with the rule of law and the formation of the European community of nations. To summarize, it should be noted that, according to the thinker, civil society is built only on individual values of civil peace and represents a generalized

constant for all mankind, the culmination of which is the realm of virtue – a categorical imperative. Thus, the German philosopher placed a person at the center of public life, who is obliged to defend the will of his or her own interests against the authorities, the state, to protect civil rights and the high moral rank of a citizen.

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## THE PHENOMENON OF BUDDHIST POSTMODERNISM: ADAPTATION OF THE TRADITIONAL TO GLOBAL CONDITIONS

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**Abstract.** The author explores the phenomenon of Buddhist postmodernism due to the adaptation of traditional Buddhist teachings, ideas, and practices to modern global conditions. The article analyzes the key ideas of modernism and postmodernism, which form a specific coordinate system and create an intellectual background for Buddhist transformations. Special attention is paid to the concepts of postmodern philosophers who critically assess blind faith in progress, economic innovations, and political institutions. Postmodernism, in turn, is considered a critical paradigm that influences the rethinking of Buddhism in a globalized world.

The article analyzes new interpretations of Buddhism emerging under the influence of postmodern ideas: deconstruction of traditional doctrines, emphasis on subjectivity, intercultural dialogue, and integration of modern scientific knowledge. Finally, examples of these changes in Western Buddhism are given, particularly in popular meditation practices and ethical approaches. The article offers a theoretical framework for understanding Buddhist postmodernism as a multidimensional phenomenon.

**Key words:** postmodernism, Buddhist postmodernism, intercultural dialogue, Buddhist Geeks, engaged Buddhism, Zen.

**Introduction.** The second half of the twentieth century was the period when crises exacerbated by catastrophic world wars began manifesting themselves in various spheres. Philosophy and the humanitarian sphere, in general, became one of the key spaces of ideas, where various thinkers tried to find new principles of ethics, a new worldview in which we could lay down safeguards against future horrors.

Modernism as a civilizational paradigm became the object of criticism of postmodernism, whose representatives realized the need to renew the value foundation on which cultures could exist in the conditions of globalization. It was about changing the game's essential rules and the coordinate system, which would allow for the return of more freedom, equality, and justice to a person and contribute to the disclosure of his creative potential. These new rules, often presented in the form of recommendations or even ironic statements by individual philosophers, were supposed to serve as a guideline for further development and form a more adaptive approach to modern challenges and global changes.

Changes in the system of civilizational coordinates also affected religious organizations, worldviews, and intercultural dialogue. As a network of various schools, institutions, and communities, Buddhism is under the influence of postmodern trends, which provide new opportunities for rethinking its foundations.

In the article, I outline «Buddhist postmodernism». First, I will outline the general features of modernism and postmodernism as worldviews, explain their interdependence, highlight the general features of Buddhism's adaptation to the new conditions of the XX-XXI centuries, and finally provide examples that can be conditionally characterized as «Buddhist postmodernism».

**The research context.** Defining postmodernism within the framework of scientific research is not an easy task due to the lack of a single, agreed-upon approach. However, the phenomenon of postmodernism becomes more precise in its interaction with what is being criticized, that is, with mod-

ernism. In this text, I consider modernism not in a historical context (as the period from the XIV-XV century to the first half of the XX century) but as a cultural and civilizational paradigm that, according to Michel Foucault, determined historical movement, progress, and culture for several centuries.

Postmodernism, in turn, is a critique of modernism, its «shadow», which reflects, evaluates and ironizes the legacy of the previous era. It is also a paradigm that seeks to rethink the West's civilizational foundations, reveal modernism's weaknesses, and propose an alternative coordinate system for the future.

However, the question arises about the subjectivity of postmodernism as a project. Many thinkers and critics whose works are considered manifestos of a new era often did not identify with this movement. This may be due to a key feature of postmodernism – the critique of identity itself.

Let us briefly define both phenomena in order to outline better the context in which new trends in Buddhism are taking shape. In turn, this definition will help to see more clearly the changes Western Buddhism is undergoing under the influence of postmodernism and its intellectual atmosphere.

Studying modernism, sociologist Anthony Giddens highlights several key features of this civilizational attitude:

- 1) a certain set of attitudes towards the world, the idea of the world as open to transformation by human interventions;
- 2) a complex of economic institutions, especially industrial production and a market economy;
- 3) a certain range of political institutions, including the nation-state and mass democracy (Giddens, 1998: 94).

An essential feature of modernism is that humanity focuses attention and efforts not on the present or the past but develops various projects for the future. Modernism pushes a person to inhabit the future thanks to science, technology, capitalism, mass production, etc. The pre-modern world experiences scientific disenchantment (Gerth & Mills, 1948) and demythologizing, which forms a fixed belief in the ability of reason to fully comprehend all the laws of being. In turn, modernism creates its mega-mythology of progress, which, in political ideologies, has acquired different shades depending on the means by which they sought to achieve the dream of future prosperity. Man and his worldview also undergo drastic changes: traditional ideas are supplanted by faith in scientific and technological progress, creating the basis for the further symbiosis of man-technology, in which the determining function is performed by reason (which is the myth of the Enlightenment), and the rest only help reason to carry the light of Prometheus.

Motivating a rational change of the future, the modern attitude influenced changes in most spheres of human life:

- science and technology determined material reality and provided dynamics of progress;
- individualism is increasing, which gives a person more personal freedom and opportunities for realization. At the same time, a modern person becomes alienated from society's traditional ties, lonelier, isolated;
- living space is rapidly urbanizing and industrializing. The centers of creative energies of humanity are becoming cities, where utilitarianism, functionalism, pragmatism, and the desire for sustainable productivity prevail;
- in the religious sphere, active secularization and demythologizing of doctrines took place;
- in the sphere of art, new media, genres, and means of expression (photography and video) increasingly gained a voice;
- the everyday life of a person was closely intertwined with the mass production of goods, industrial changes, and the scale of construction;
- the political sphere became increasingly massive, and the spectrum of ideologies allowed to represent all possible ideas about the status of a person, a nation, and ways to realize an ideal future. I want to note that all key concepts were also understood differently in different ideologies. For

example, freedom, justice, equality, the right to realize one's dreams, and national projects acquired opposite incarnations in different ideologies.

Actually, history has shown in many examples that a modern person who is oriented towards progress but forgets about the present, ethical values, and humanity (which he is ready to sacrifice for the sake of progress) turns into a monster, a brilliant monster, a tyrant capable of large-scale crimes. The First and Second World Wars, genocides of various groups on national, religious, and political grounds, the Holocaust and the Holodomor, and the terrors of the «red regimes» in different countries of the world showed another side of modernism and its attitude. The achievements of Reason, technology, and scientific inventions can be used for the effective mass destruction of «enemies» who were previously deprived of the status of «people». Instead of the aristocratic elite, clerics, a new elite of magnates, bankers, nomenclature, and bureaucracy came to power.

In the post-war period of the XX century, many philosophers joined the criticism of modernism. Among the authors who are considered postmodern, it is worth mentioning Michel Foucault (Foucault, 1995), Jean Lyotard (Lyotard, 1984), Gilles Deleuze (Deleuze, Guattari & Foucault, 2009), Jean Baudrillard (Baudrillard, 1994), Jacques Derrida (Derrida, 2002), Richard Rorty (Rorty, Williams & Bromwich, 2017), Paul Feyerabend (Feyerabend & Hacking, 2010), etc. Each of these authors criticized the metanarratives of modernity, which include objectivity, rationalism, historical progress, and identity. The methods of combating these ideas of modernism were intellectual sabotage, irony, and play, which manifested themselves in different ways, depending on the author's discourse. The attention of postmodernists was also focused on showing the artificiality of the binary pairs on which the worldview of the modern era was formed: objectivity-subjectivity, reason-affects, progress-decadence, city-village, identity-hybridity, church-state, religion-science, modernity-tradition, etc. In this picture, there is always an ideal and a consequential opposite. Actually, postmodernists amplified the voice of opposites with their rhetoric, and then it remained only to observe the consequences to which this led. As a result of these experiments and intellectual jokes, a radical rethinking of the foundations occurred in various fields. For example, in the philosophy of science, new theories appeared regarding the formation of the nature of knowledge and progress; in the social sciences, interest in the mutual influence of the individual and the group deepened; in religious studies, there was a turn to religious phenomena and movements that did not fit into the previous picture. The metanarratives of modernity largely determined the worldview for several centuries and also justified colonialism, assimilation, military intervention, etc.

A considerable price had to be paid for the modernist ideal of world progress. In addition to large-scale wars, destruction, and genocides, we also inherited environmental disasters, global warming, and the strengthening of authoritarian regimes. In fact, modern humanity has faced challenges, the solution of which depends on whether the world will continue to exist. As for postmodernism and its further fate, its nature does not include any special structure on which an alternative to modernism can be built. This movement cancels itself when applied to metanarratives, absorbing into the corresponding existing institutions and pictures of the world.

**Postmodernism and Buddhism.** As a sprawling network of different, similar discourses, Buddhism has also been influenced by new ideas of postmodernism. These ideas have been used both to criticize «orientalism» in relation to Buddhist traditions and to reflect on trends that have emerged in the process of translation to the West (I write about these trends and their characteristics above in the book). Buddhist thinkers and activists also join global processes, particularly by adopting postmodern intellectual tools.

For example, Bhikkhu Bodhi, a Theravada monk known in the West and a translator of canonical texts into English, believes that Buddhism is integrated into Western history and has been influenced by all significant narratives. In his lecture on the postmodern model of Buddhism (Bodhi, 2010), he mentions the premodern era, its change by modernism, and its subsequent displacement into the crit-



ical stage of postmodernism. Although modernism has given humanity many useful things, including individual identity and freedom from religious dogma, it has left the same person alone with the challenges of time, isolated and alienated from all previous connections.

Modernism also reduced a person to specific characteristics that meet the era's demands but, at the same time, ignored all other consequential characteristics or aspects – for example, emotions, empathy, community, etc. Thanks to postmodern criticism, an important participatory turn occurs when the community regains its role as an agent of change, and the individual finds a scenario of non-egoistic behavior. For Buddhism, this is expressed in a return to important themes of cultivating compassion for living beings and including a person in a broader picture of the world, where a person does not have a central position, but everything exists in interdependent interaction. One of the responses to the modern world crisis in Buddhism is its involvement, that is, a socially active movement, the purpose of which is to fight for human rights, ecology, freedom, etc. There is an active exchange of ideas between Buddhism and postmodernism in philosophy. For example, Harold Coward explores Derrida's deconstruction in the context of Indian philosophy (Coward, 1990), Newman Grass analyzes the postmodern philosophy of religion in Buddhism and the West (Glass, 1995), Ann Gleig traces the evolution of hippie ideas into postmodern narratives of postmodern Buddhism (Gleig, 2014), and Takao Hagiwara compares Derrida's views with Zen Buddhism (Hagiwara, 2014). Also interesting in the context of the dialogue between Buddhism and postmodernism are the works of Dan Lee (2016), Anna Lutkajtis (2019), David McMahan (2008), Donovan Muir (n.d.), Carl Olson (2000), John Pickering (1995), Gina Park (2010), Simon Smith (1997), etc. It is important to understand that this dialogue is interdisciplinary, which in itself is the result of postmodern criticism: the theoretical discourse of Buddhism is formed, interpreted, and voiced by both Buddhists, representing different positions on their own tradition and researchers. The previous modern assumption that scientists know Buddhism better than its bearers has ceased to work. In contrast, there is an actual attempt to understand Buddhism as a living network of alternative, original religion.

Another response of modern Buddhism is the emergence of various institutions that seek to spread their own vision of the future, where ethical leadership, meditation programs for cultivating compassion, and initiatives to help socially vulnerable groups are of great importance. Attempts to criticize the pretentiousness of science (Wallace, 2000), «cognitive imperialism» (Roth, 2008), secularism (Bodhi, 2015), etc. are gaining increasing importance. In other words, modern Buddhism is quite actively and successfully adapting to global conditions, responding to the demands of postmodernism and applying self-reflection and self-criticism in various intellectual environments. The emergence of the Internet also catalyzed significant changes in Buddhism in the postmodern era, as well as the development of information technologies, which significantly expanded the possibilities of communication between environments, schools, and Buddhist countries. This was facilitated by the emergence of the phenomenon of cyber-sangha (Prebish, 2004), as well as the cartography of Buddhism through social networks as a huge, widespread, living reality of communities trying to find a value foundation in the modern world.

**Buddhist postmodernism.** In addition to the general influence of postmodern ideas on engaged Buddhism, comparative studies, and the enrichment of Buddhist philosophy, there are also specific phenomena that scholars define as Buddhist postmodernism. These phenomena illustrate hybridization, the lack of clear boundaries between identities or denominations, the use of information technology, and an emphasis on horizontal connections. I offer a few examples for consideration.

In a thorough study of contemporary Buddhism in the United States, Dr. Ann Gleig (2019) draws attention to a community that may be an example of Buddhist postmodernism. This is the «Buddhist Geeks Project» and its subsidiary project, «Meditate.io», which have existed since 2007. The creators of these initiatives were Vince Horn and Ryan Oelke, representatives of the millennial generation who seek to combine Buddhism (meditation and philosophy) with modern information technologies. They

also view Buddhism as a program in which «code» can and should be improved. They created a series of podcasts to which they invited various teachers, scientists, programmers, and other interested people. Subsequently, they organized several conferences to prepare the ground for the development of developments in the format of a platform for teaching postmodern Buddhist meditation. A feature of the approach is that in the phrase «Buddhist meditation», there was less and less of Buddhism itself because, for the supporters of this initiative, neither traditional teachings nor texts have special significance.

Vince Horn defines «Buddha Geeks» as a modern koan (Gleig, 2014: 179), an unanswered question that should break specific patterns of thinking. In his opinion, the modern generation should take responsibility for the project of Buddhism of the future in symbiosis with technology. Interestingly, both founders of the project were students of Naropa University, which is also a vivid example of a non-denominational, interdisciplinary approach to Buddhist teachings. To a certain extent, this educational institution as an intellectual environment can be defined as postmodern Buddhism, genetically derived from Vajrayana, Tibetan Buddhism, thanks to its founder, Chögyam Trungpa. At this university, the idea for the “Buddhist Geeks” project was born.

Podcast recordings can serve as an audio archive of conversations with famous people. For example, Emma Seppala (scientific director of The Center for Compassion and Altruism Research and Education), James Hughes (Buddhist transhumanist), Daniel Ingram (self-proclaimed arahant, author of a meditation technique), Stephen Batchelor (secular Buddhist), David Loy (Buddhist eco-activist) participated in the conversations. As of June 2024, there were more than 450 issues (Buddhist Geeks on Apple Podcasts, 2024), which became a kind of manifesto of «geeks».

Ann Gleig highlights several main themes that are key to the project and its ideologists:

1) «Much of Buddhist Geeks was devoted to celebrating how technology and social media were being used to both aid traditional Buddhist practices and enable the emergence of radically innovative forms of Buddhism». (Gleig, 2019: 188).

2) «...the advancement of an integrative and world-affirming approach to Buddhism in which all aspects of contemporary daily life – technology, business, relationships, social justice, and creativity – were legitimated as potential sites for awakening» (Gleig, 2019: 189).

3) «...the advancement of a pragmatic and experiential approach to Buddhism that utilizes whatever teachings and practices are helpful to end suffering. This type of orientation is commonly referred to as “DIY Buddhism» (Gleig, 2019: 189).

4) «...a disruption of traditional Buddhist forms of hierarchy and authority and an emphasis on the democratization of practice. This democratization occurred on multiple levels, from the recasting of enlightenment as a natural human developmental capacity to the emergence of more collective and participatory models of Buddhist communities» (Gleig, 2019: 190).

5) «...a pluralistic and nonsectarian approach to exploring not only multiple Buddhist lineages and traditions, but also other contemplative traditions and systems and discourses of knowledge» (Gleig, 2019: 191).

In line with these themes, it is natural to see secular, transhumanist, posthumanist, and posttraditional Buddhists participating in conferences, seeking opportunities to voice their own positions. This kind of polyphony complements Buddhism with postmodern perspectives.

The subsidiary project «Meditate.io» is an attempt to go beyond the confessional framework to offer a set of tools, instructions, and «spiritual technologies» to modern people. The project also aims to launch the next generation in the mindfulness movement, which is mainly associated with the «boomer generation» (Jack Kornfield, Sharon Salzberg, Jon Kabat-Zinn, etc.). The terminology is also changing: there are many more analogies with coding, information engineering, and awakening technology. Metaphors of the information age prevail over Buddhist terminology in the geek lexicon. Interestingly, criticizing the previous generation for artificial stereotypes about Buddhism, geeks also

claim to create universal maps of meditation and consciousness. This universalism has all the signs of perennialism, which is already familiar to the 20th century but is armed with a belief in the power of information technology. Buddhist geeks emphasize the participatory, lace-like nature of the practice. Instead of focusing on the individual, on one's qualities, it is worth refocusing attention on social practices, a shared vision, and a community-creating meditative culture (Gleig, 2019: 198).

Paradoxically and in the spirit of postmodernism, Buddhist geeks do not reject modernism altogether. The myth of the scientific nature of Buddhist teachings, which was born thanks to Buddhist modernism, although it is actively criticized, continues to develop in the context of the Internet, code, software, and video games (McGonigal, 2011). Although the previous generation could not understand the limitations of modernism, the geeks want to claim the role of those who «can correctly» combine Buddhist teachings with modernity. This generation can find the Buddhist singularity (Wiegand, 2010).

They also borrow from Buddhist modernism with an emphasis on meditative experience. Daniel Ingram's pragmatism (Ingram, 2018) is reinforced by the thesis that the previous generation did not pay enough attention to personal experience (Gleig, 2019: 203). One should take more initiative in «collecting» and «disassembling» meditative practices and Buddhist teachings (Rinzler, 2012): here, too, we observe the metaphors of information technology. Not forgetting the dangers of excessive commercialization of meditative practices and the transformation of mindfulness into McM mindfulness, Buddhist geeks aim to radically change the situation, maximally de-democratizing it (making it accessible to everyone) and hybridizing it (further decontextualizing it from Buddhism and combining it with other «spiritual practices»).

Thus, «Buddha Geeks» is a rather paradoxical phenomenon of Buddhist postmodernism, combining elements of modernism (dialogue with science and technology, meditative experience, etc.) and postmodernism (anti-hierarchy, participatory, hybridization, overcoming Buddhist identity). They remain open to dialogue and involve other «alternative» models of Buddhism (secular, transhumanist, post-traditional Buddhists). Through the mediation of famous teachers, they also maintain certain connections with traditional denominations of Buddhism, as well as an emphasis on the need to give a voice to the Buddhist diaspora. In the spirit of postmodernism, they criticize the discourse of the «white Western Buddhist» as a vestige of the colonial era. For example, in a speech on Buddhist postmodernism, Carl Gregg mentions being inspired by Chenxing Han's book (Han, 2021), where the author argues why Buddhism in the West needs to engage diasporic Buddhism.

In addition to the «Buddha Geeks», examples of Buddhist postmodernism can be found in the Theravada of Thailand (Taylor, 2021) and in Zen Buddhism in the United States. A striking case is Tony Packer's community, which broke away from Philip Kapleau's organization and created its educational project, which severed ties with traditional identity (McMahan, 2008: 245). Furthermore, of course, the initiatives of the very baroque Tibetan teacher Chögyam Trungpa, who founded Naropa University (McMahan, 2008) outside of traditional Buddhist ties, transmitting his views on education as a special place for spiritual transformation to the next generation of students and teachers.

**Conclusions.** Buddhist postmodernism is a reminder that the era's general features affect the community's internal processes, changes, and transformations. Buddhism is a network of diverse communities and environments that contains different forms of interpretation of key doctrines or practices. In such conditions, the emergence of «Buddha Geeks», post-Zen communities, or the blurring of confessional frameworks with other worldview systems is an entirely natural phenomenon, a sign of the spirit of the times.

Currently, we can observe how the legacy of the dialogue between Buddhism and the West is being rethought and critically evaluated. Thanks to the intellectual tools of postmodern philosophers, Buddhists have an interesting opportunity to experiment with their own identity, meditative practices, and, in general, with a vision of the future. In these conditions, the importance of personal, alternative

interpretations of Buddhist philosophy is growing, which is not always easily perceived in a traditional environment.

Ultimately, Buddhism is a network of different communities that belong to a large number of schools, trends, and cultures. Buddhism's natural ability to adapt, to change, and yet retain its own ideological identity is most vividly expressed in the phenomenon of Buddhist postmodernism. This phenomenon is another reminder that Buddhism is about living people who find themselves in different situations, contexts, and life stories that motivate them to join this dynamic movement. In addition to mastering the fundamental principles of the teachings, they also add their personality and touch to the texts or artifacts that emerge from intellectual experiments.

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## CURRENT AXIOLOGICAL ASPECTS OF THE DEVELOPMENT OF CIVIC COMPETENCE AMONG HIGHER EDUCATION STUDENTS IN THE CONTEXT OF WAR IN UKRAINE

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**Abstract.** The paper focuses on the relevant axiological features of the development of civic competence among higher education graduates during the current stage of Ukrainian civil society creation in the context of conflict. The analysis of a wide range of scientific and educational sources based on socio-philosophical, socio-psychological, and sociological and interdisciplinary approaches, using general scientific methods, revealed that the development of civic competence of education seekers is implemented in the actualization of the principles of civic cohesion, shared values, and degree of identification with Ukrainian society. It has been demonstrated that the development of educational programs that include the philosophical and ethical aspects of war, as well as the creation of innovative teaching methods aimed at the development of peacemaking skills and strategies that contribute to the cohesion of the Ukrainian community, is relevant for the effective development of civic competence among students of higher education in Ukraine at this time. The justified need for a philosophical understanding of the axiological dimensions of the problem of the development of civic competence of Ukrainian higher education graduates in times of war on the basis of the holistic paradigm of cognition and the implementation of axiological determinants in the educational process of civic education of education seekers in the course systematic scientific support.

**Key words:** civic competence, Ukrainian civil society, axiological determinant, interdisciplinary approach, higher education students, educational strategies.

**Introduction.** Today, civic identity, civic stand, civic ability, and involvement among higher education students are fundamental parts of the Ukrainian community's existence and a predictor of the potential of its national, political, and cultural subjectivity in the future. Given the ongoing Russian-Ukrainian war, several difficulties concerning the effective development of civic competence among students of Ukrainian higher education institutions have emerged in the sphere of higher education. Today's challenges necessitate not only higher education students' awareness of their civic rights and responsibilities, but also the ability to navigate information sources, form a personal attitude toward the nature of changes in the country's and abroad's social, political, and cultural life, weigh their civic behavior responsibly, and determine civic priorities in the educational space of countries of forced residence, among other things. The concerns of civic education and the formation of students' citizenship are of scientific interest to foreign thinkers and practitioners, and they are addressed in various international educational texts, including the European Framework of Key Competences. Many sectoral studies have found that civic competence is a significant socio-psychological characteristic of a higher education student's personality, and its development is an urgent scientific problem that shall be solved in order for education to carry out these processes in a targeted and controlled manner.

**Literature review.** In the context of the development of civic competence as a component of the general competence of the individual, which determines the effective behavior of the individual to realize his or her role as a citizen, we relied on the conclusions and provisions of the works of scientists and practitioners, which indicate the need to take into account:

- recognition of the leading role of higher education students' orientation to the public good; adequate perception of their own role and the role of others in the functioning of communities and society as a whole (Antonova, 2003);

- a comprehensive structure of students' civic competence, which involves the following factors: civic duty; civic competence and civic skills; social connections and civic participation; consideration of students' civic competence as an integrated construct that includes civic behavior, skills, connections and involvement of students in civic participation (Levine, 2008);

- peculiarities of the relationship between cognitive and behavioral processes of students' personal development and implicit behavior of using the knowledge acquired during education, the expediency of developing a subjective sense of identity and integrity of the individual that meets both personal and social needs; and the development of personal resilience as a system of beliefs about oneself, the world, and relationships with the world (Levine, 2008).

- readiness of the individual to act in conditions of constant lack of information, lack of clear guidelines and previously prepared templates (Hrabovska, 2024);

- understanding of civic competence as the ability to exercise one's rights and freedoms, which is considered as a component of the system of development of civic competence of students, according to which competent civic activity of students should benefit both the individual and the community (Pozniak, 2013);

- civic competence plays a positive role in the successful formation of a higher education student as a citizen in the broad context of axiogenesis of socio-cultural values of students in higher education, which determines the axiological orientation of the educational and cultural environment of higher education as a sphere of development in the value-semantic sense, based on civic values and stimulated by motivation for civic activity (Antonova, 2003; Zaredinova, 2020).

The analysis of domestic and foreign research materials that focus on the civic development of students and the growth of their civic involvement allows us to identify a number of variables that ensure:

- 1) social cohesion;
- 2) civic skills;
- 3) civic involvement or responsibility;
- 4) civic action.

Regarding the structure of the development of students' civic competence, the researchers have identified the following factors: civic responsibilities; civic skills; social connections and civic participation (Bobek, Zaff, Li, Lerner, 2009: 615-627). The above-mentioned exceptionally broad variety of approaches to the problematic field of tasks needs the identification of priority directions in completing these tasks using axiological reasoning.

**Purpose of the article:** to identify the actual areas of social and philosophical scientific thought based on the materials of interdisciplinary research of recent years and to substantiate the feasibility of systematic axiological support for the development and implementation of educational programs for the development of civic competence of higher education students

Since the current specifics of the formation of civic competence of higher education students require a clearer understanding of the ways of its development, the objectives of our interdisciplinary research are:

- to consider the actual areas of axiologically oriented support for the development of civic competence of students by means of philosophical science in Ukrainian higher education institutions;

- to substantiate effective approaches and means of implementing relevant educational practices for the development of students' civic competence based on the value determinants of civil society.

**Research methods.** The study employs socio-philosophical, socio-psychological, and sociological ideas, as well as scientific methods such as classification, abstraction, comparison, formalization,

analogy, deduction, induction, synthesis, and analysis. In the analytical section of the study, we used an interdisciplinary approach to organize and build a comprehensive picture of the research.

**Results and Discussion.** According to the foundations of the axiological paradigm of the philosophical study of social aspects of social evolution, the most visible indicator of an individual's civic status today is the presence of freedom as an attributive quality. A civil community is "the government of the free" and "the ultimate goal of civil society is to achieve a happy life, which is facilitated by both state and personal relations" (T. Aquinas). According to Fromm, "human existence and freedom are inseparable from the very beginning," but mainly dominated by "freedom from" – freedom from instinctive conditioning of actions. Human existence begins when "the development of activities not determined by innate mechanisms reaches a certain limit: adaptation to nature loses its coercive character, and ways of acting are no longer determined by heredity and instincts." It is worth noting that the philosopher also stated in his work "To Have or to Be" that the next level of freedom is the problem of self-determination in the world, or the problem of realizing positive freedom ("freedom for") based on each person's uniqueness and individuality.

Socio-philosophical, socio-psychological, psychological-pedagogical, and sociological approaches amass several meanings that gain universal educational value and are projected into the development of both civil society in general and students' civic competence:

- civic responsibility and civic engagement of the individual;
- subjectively significant civic-oriented knowledge, skills and abilities;
- personal properties of students and their attitude to reality;
- spiritual self-development, self-improvement and self-regulation of civic behavior.

Since it is impossible to consider the whole range of vectors related to the development of social and civic skills of students in the format of the article, given the relevance of axiologically oriented educational support for the development of civic competence by means of higher education, we will focus on several important, in our opinion, areas of effort of scientists and educators.

Consideration of the main definitions of civic competence in the works of various authors has made it possible to state that civic competence is a complex and multifaceted characteristic of the development of the applicant's personality, which implies the result of the development of civic competence:

- the student's knowledge of the necessity for social participation and active manifestations of personality – as types of activity in a social, public direction;
- active study of the fundamental foundations of social development, as well as responsibility for implementing their basic principles in everyday life and activities, such as tolerance of ethnic minorities and public organizations, acknowledgment of individuals' free participation in them, etc.
- the need for public activities and deeds that demonstrate patriotism, ethnic tolerance, human integrity and dignity, and a political culture based on civic ideals;
- gaining experience of socially relevant situations aimed at preserving citizens' rights, internal desire to strive towards a social objective, and manifestation of civic orientation as a stable motivational development in the course of socially significant activities (Boryshevskiy, 2007:5-7);
- devotion to public affairs and civic solidarity as a personality attribute in the active manifestation of a citizen – patriot, professional, or democrat; an individual's internal tendency to construct and develop a humane society in conjunction with the accomplishment of national objectives.

The study of studies demonstrates that methodologists interpret the concept of "social priorities" as a driving force of a complex nonlinear social system, as an equal constant of leading values targeted at societal reproduction and progress (Nadybska, 2011:7). According to O.Ya. Nadybska's concept, the system of priorities is divided into two vectors: the first vector aims to describe the most important values for society (directly indicates the most important priorities that society is attempting to reproduce); the second vector aims to comprehend the space of rejection (indicates those phenomena that society considers inappropriate to realize through reproduction mechanisms) (Nadybska, 2011:18).

O.Ya. Nadybska's works emphasize the multiple-compositional nature of priorities, their multidimensionality and nonlinearity, and, given that a person is a social being and cannot fully develop outside of society, the communicative nature of their creation. As the researcher correctly argues, social goals are rich in content, which makes it feasible not only to envisage but also to establish their aspects at each stage of the society's growth (Nadybska, 2011:24).

Since today K. Popper's open society is turning into an ultra-open one, in which, thanks to virtualization, the usual natural environment is "dissolving" and the educational and social space is simultaneously universalizing and fragmenting (Hlebova, 2013:24), the modern state is largely becoming a threat to Ukraine itself, because state-building processes in Ukraine do not always go hand in hand with signs of civil progress. As a result, governmental institutions may take on a quasi-character, and society will continue to be influenced by marginalizing elements, despite the fact that the establishment of a community's cultural identity coincides with the process of civic growth. As a result, researchers correctly believe that the direction of national-patriotic education in Ukraine should take into account the current requirements for active defense and resistance to large-scale information flows from Russia, a targeted propaganda campaign that degrades the dignity of the entire nation and calls into question our past and future. Ukraine is in a transitional situation of recognizing and protecting Ukrainian identity against imperialism, freedom against conformism, and civil values against authoritarian tendencies (Aleksandrovska, Shyrokykh, 2023:13).

Today, the humanities regard students as a distinct social category, a specific community, organizationally united by their enrollment in a higher education institution, when the value-oriented activities of an individual who attempts to construct his or her behavior on the basis of consciously chosen and learned criteria and norms are significantly activated (Nabokova, 2024:66). In light of this, it is important to introduce qualitatively new approaches, methods, and disciplines to prepare students for life in the new conditions of a democratic society, which would be aimed at shaping the political consciousness of young people based on the ideas of national and spiritual revival of Ukraine, rooting political values, norms, orientations, and patterns of behavior in the minds and behavior of the prevailing system, and ensuring the level of political education necessary for the perception of democratic ideals and norms (Bukrieva, 2013:81).

L. V. Afanasieva and I.V. Bukrieva in their work "Educational Space and Ethical Components of Its Formation" argue that the phenomenon of ethnicity as a socio-cultural feature of a person has not exhausted itself as a means of achieving social harmony, and therefore a philosophical reassessment of the ethnic "parameters" of humanity is extremely important: unity and internal diversity in the formation of educational space (Afanasieva, 2011: 38). The researchers also point out that although the form and nature of youth civic participation in society are quite significant factors that affect the quality of political processes in the country and the intensity of democratic transformations in society, the development of their value consciousness is hampered by a number of subjective and objective obstacles to self-determination in the social, political, and ideological spheres, and entry into the social and ideological spheres and entry into the social and ideological structure of society.

Researchers N. Hlebova, N. Falko, L. Afanasieva, E. Murtaziiev, and M. Semikin collaborated to identify the actual elements of influence and modifications in the dimensions of the socio-cultural identity of Ukrainian students abroad. In particular, the researchers note that today the active processes of self-construction of the image of their own civic identity of students of Ukrainian universities are significantly influenced by the value concepts prevalent in the foreign social environment, which are supported and activated by both internal political and external socio-cultural factors (Hlebova, Falko, Afanasieva, Murtaziiev, Semikin, 2024). First and foremost, we discuss students' sociocultural competence as a value prerequisite for civic competence. We argue this conclusion by examining the structure of intercultural competence. According to researcher L.F. Hlynska, the structure of intercultural competence includes the following elements:



- knowledge competence (understanding of own values, their interdependence and interdependence;
- social competence – the ability to adequately respond to conflict situations and contradictions in the process of intercultural communication, the ability to show empathy for a representative of another culture;
- self-competence (self-esteem) – the ability of applicants to identify cultural values, ideas, phenomena of culture or subculture that contribute to the formation of their personality;
- activity competence – the ability to analyze “own” and “foreign” culture, the ability to consciously model intercultural communication.

According to the researcher, one of the most fruitful forms of intercultural communication is the exchange of "capabilities" between the people involved, i.e., what has already been generated, shaped, and is ready for exchange. Thus, the development of intercultural civic competence is based on the awareness of the differences between "one's" and "other" cultures, and the knowledge that measures "one's" culture and determines the orientation and behaviour of a person should not be anticipatory, but should be constructed in the process of developing intercultural competence (Hlynska, 2017: 23).

The last mentioned point is very important in the context of our study, given the need to predict the consequences of the impact of the stay of Ukrainian students abroad on the development of Ukrainian post-war society. It also emphasizes the need for a philosophical consideration of the value-subjective aspects of the forced emigration of Ukrainian higher education students and its importance for the axiological adjustment of the educational process in higher education institutions (Hlebova, Falko, Afanasieva, Murtaziiev, Semikin, 2024). According to the concepts discussed above, civic competence in today's pupils cannot be envisioned without a component known as personal resilience – a person's willingness to act in the face of persistent lack of information, unclear guidelines, and previously created templates.

According to researcher I. Hrabovska, "the well-being of an ordinary person (Ukrainians are no exception) in times of cataclysms (disasters) is a state of constant stress and total fear, uncertainty and threat." As a result, she believes that "the study of the problem of human experience of cataclysms is one of the basic scientific problems of the world's socio-humanities," given that the world has entered an era of dynamic alterations that are often unanticipated and uncontrollable. But it is also a community's true ability to survive, which is dependent on its citizens' resilience (physical and spiritual); patriotism and ability to resist the enemy when it comes to anthropogenic disasters; a sense of love for the Motherland and the responsibility of the elites; and effective and professional leadership in the extraordinary conditions of the community's existence." That is why, according to the researcher, studying the human experience of cataclysms is one of the basic scientific problems of the world's socio-humanities, "and for Ukrainian scholars it is not only relevant as a security, economic, political, anthropological, etc. issue, but also as a philosophical one, since Ukraine is now at the epicenter of the global world's reorganization" (Hrabovska, 2024:29).

In the framework of the values approach, we observe that, like tolerance for uncertainty, resilience is a set of beliefs about oneself, the world, and one's connections with it. H. Falko correctly points out that this disposition contains three relatively autonomous components: involvement, control, and risk taking, and it is the development of these components that prevents the emergence of internal tension in stressful situations, because a person is open to new experiences and believes that what is happening gives the individual the best chance of finding something more valuable, interesting, and useful. Another key point to remember is that resilience cannot be developed without prior experience; diverse facts about a person's life route are incorporated into life experience only if they become a personally relevant event (Falko and Ostopolets, and Sharapova, 2024:59). In this social setting, all members of the community, particularly higher education students, bear a moral obligation to use their civil liberties in a way that does not violate the human rights of those around them. As a result, in light of modern Ukraine's security issues, the content component of the category of "social cohesion" should be viewed as a "doctrine of ensuring societal sustainability."



Researchers typically use an integral indicator of social cohesion, which combines individual components such as the level of support and mutual assistance; the level of trust in social institutions; the commonality of values; the degree of identification of the population with Ukrainian society, using certain indicators of social cohesion: socio-psychological adaptation, migratory trends, sense of belonging, tolerance, and socially responsible citizenship (Shcho take...).

At the cultural level of the development of students' civic competence, the concept of cohesion includes a combination of several components: identity, trust, accessibility, and interaction, which can objectively indicate the level of social cohesion. The researchers also draw attention to the closeness of the concept of "social cohesion" to the concept of "social solidarity" (Afanasieva, Bukrieva, Hlynska, Hlebova, 2022: 68).

As a result, we believe that the conceptualization and implementation of the axiological determinant in the process of developing students' civic competence should be based on the identification of many value characteristics of the student's personality using philosophy and their combination in several directions:

- philosophical and educational interpretation of the categories of identity, trust, accessibility, and interaction, which are objectified by sociological science and may indicate the relationship between changes in the levels of social cohesion and civic competence of a specific social group, including students (Afanasieva, Bukrieva, Hlynska, Hlebova, 2022: 69).

- the educational program for applicants to philosophical disciplines should be updated to reflect current trends in the specialty, labor market, sectoral and regional contexts, war, temporary occupation of territories, and de-occupation processes using online technologies;

- experience with distance education programs in domestic and foreign contexts will also be utilized;

- use of successful cases and positive experience of higher education institutions that demonstrate the effectiveness of educational, scientific, and cultural support of social processes for the development of social unity of the movement, popularization of the values of the Ukrainian people, strengthening of the national idea and statehood (Afanasieva, Bukrieva, Hlynska, Hlebova, 2022: 69).

When war emerges as a civilizational concept or a key concept of a particular culture's state, the idea of peace is primarily an axiological concept that refers to the idea of positive values, to the realm of the desirable rather than the actual, and at the same time to the idea of "how it should be," that is, to the realm of norms, prescriptions, and appeals. Therefore, these tasks are relevant today, in times of war, when "modern warfare is a war in the minds and for the minds; it is a war for cognitive and communicative control, for power over people's consciousness, emotions, thinking, reason and, accordingly, over their behavior; it is a struggle for the dominance of certain ideas about the world and events in the social and individual environment and the simultaneous destruction of opposing, 'enemy' opinions and thoughts" (Parakhonskyi, Yavorska, 2011:20).

As an example of an effective strategy, consider the conceptual underpinnings for building the subject "Philosophy of War and Peace" to give students with systematized information about the challenges of societal violence, conflict, and peace (philosophical aspect):

- to form a body of knowledge about: the nature and significant features of war and societal violence; concepts about war and peace (from ancient world philosophy to German classical philosophy); ideas about war and peace from a modern worldview; hidden meanings of hybrid warfare and security dangers for Ukraine;

- to form and develop students' understanding of the problems of social violence, war and peace, and modern views on war through the prism of the formation of a multipolar world in which norms, values, and ideals are reassessed, new factors of change are identified, and the most recent phenomenology of war and armed struggle is manifested;

- to develop in students the ability to critical system analysis as a prerequisite for the formation of skills and abilities necessary for the implementation of scientifically based measures to improve its effectiveness in protecting national interests, within their professional competence ( Sytnyk, 2023: 3).

In our opinion, an attempt to summarize modern views on war through the prism of the formation of a multipolar world is quite appropriate in the work by Y. M. Horbal and N. I. Hlebova "Philosophical Dimensions of War: Influence on the Formation of Educational Identities in the Modern World" (Hlebova, Falko, Afanasieva, Murtaziiev, Semikin, 2024),, which systematizes the axiological dimensions of war in their projections on education in the concept of M. Trebin ( Trebin,2016):

a) the philosophical impact of war on education:

– the ethical dimension (the morality of actions, such as just war (jus ad bellum) and ethical norms of warfare (jus in bello) touch upon fundamental principles of law and morality that form the value orientations of educational systems);

– the existential dimension (the desire to reconsider the meaning of life, death, and survival, which produces existential crises that affect the formation of personal and social identities, as represented in the content and methods of education);

– the political dimension (war-related decisions have an impact on educational policy, curricular content, and educational ideological orientation).

b) the social side of conflict, transferred onto educational identities:

- ideological influence (educational systems are frequently utilized to build patriotic and nationalist identities in the setting of war, when ideological control over the content of education is reinforced, influencing young people's worldview creation);

- war changes historical narratives in schools and universities, affecting collective memory and national identity;

c) the globalization factor in the context of educational strategies (wars, in particular terrorism and hybrid conflicts, emphasize the need for a global educational identity, as education should take into account global challenges and contribute to the formation of world citizens capable of critical thinking and intercultural communication) (Trebin, 2016).

We agree with the views of the preceding writers and feel that the axiological determinant of the practical execution of philosophical elements in the development of students' civic competence in today's circumstances should be based primarily on the following components:

- student critical thinking development (educational programs should include courses in ethics, philosophy, and war history that promote the development of critical thinking, which will help students develop worldview competence as a component of civic competence, as well as a deep understanding of the complexity of war and its impact on society and the individual);

- development and content of peace education programs (programs aiming at peaceful conflict resolution and nonviolent communication can serve as an alternative to military ideology while also contributing to the development of competencies in the culture of peace and tolerance).

- development of an axiological interdisciplinary approach (the study of war and its impact on society should be interdisciplinary, combining approaches from philosophy, sociology, history, political science, psychology, law, pedagogy, and other fields of social sciences and humanities, to ensure higher education students' civic competence and successful application of acquired competencies in social practice).

**Conclusions.** Based on the consideration of the theoretical foundations of the axiological determinism of civic education and the practical developments of specialists in various fields of social sciences and humanities in the broad context of the task of developing students' civic competence, at this stage of our work, we state the following:

The supreme values of an open democratic society are life, liberty, tolerance, and civic responsibility for every individual. On this basis, researchers of the problem of developing civic competence

in higher education students in their approaches rely on a wide range of sectoral developments of domestic and foreign philosophy of education, social psychology, sociology, and pedagogy, operating with a number of integral indicators of the development of personal competence in the context of research on the cohesion of Ukrainian society, which is determined by generalizing individual components: the level of support and mutual help; the level of trust in social institutions; the shared values; the degree to which the applicant category identifies with Ukrainian society, etc.

The study of the development of civic competence in students at the cultural level demonstrates the utility of using the concept of civic cohesion as an integrated characteristic of the systemic development of civic identity, social trust, and interaction, which can objectively indicate the relationship between the level of civic competence development in a social group of students and the level of social cohesion. An important point is the need to develop intercultural aspects of students' civic competence, which is carried out by students in the process of acquiring knowledge, educational and civic practices of conscious tolerance of value differences between "their" and "other" cultures, and the knowledge by which "their" culture is measured and determines the orientation and behavior of a person should not be anticipatory, but should be constructed in the process of development. It is worth noting that students' civic resilience does not develop without prior experience, and many information about the life route can be integrated into life experience, but only if they become personally relevant occurrences. In this social framework, all members of the educational and civil communities assume moral responsibility in the exercise of their civil liberties: the practice of justice and reciprocity generates social order and stability.

We state the need for the practical implementation of the considered approaches and the implementation of the axiological dimension in the civic education of higher education students of Ukrainian higher education institutions in the conditions of war. This should combine the development of critical thinking of students (which will create a knowledge base for understanding the complexity of war and its value impact on society); development of the concept of peaceful education aimed at peaceful conflict resolution and non-violent communication (as an alternative to military ideology); development of an interdisciplinary approach based on holistic methodology (to ensure comprehensive understanding and successful application of the acquired competencies in civil life and social practice by higher education students).

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## THEORY AND CHRONOLOGY OF HISTORY

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### MOBILE LESSONS LEARNED TEAMS IN THE ARMED FORCES OF UKRAINE: ADAPTATIONS AND INNOVATIONS IN THE WAR (2014–2024)

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**Abstract.** The paper examines the employment of mobile lessons learned teams within the Armed Forces of Ukraine during the Russo-Ukrainian War (2014–2024). These squads served as integral components of two successive learning systems and evolved through two phases: Formation (2014–2018) and Modernization (2019–present). The article explores the establishment of these groups and the development of their operational methodologies. It analyzes the specific roles these teams have played in learning processes, emphasizing their pioneering contributions to enhancing the lessons learned capability. Notably, these squads have been instrumental in ensuring the timely and high-quality analysis of critical combat experiences.

Historical research of various categories of mobile lessons learned teams in the UAF and leading global militaries has been conducted, highlighting innovative approaches of the Ukrainian squads. The study proposes a classification of these groups based on their functional purposes, identifying three types: Collect and analyse observations; Supervise and assist in lessons implementation; and Monitor and evaluate the learning process. The findings include recommendations for improving the operational efficiency of these teams.

**Key words:** organizational learning, lesson identified, lesson learned, best practice, lesson analysis, experience implementation, NATO.

**Introduction.** Throughout history, military learning has proven to be a vital foundation for developing and adapting the armed forces (AF), enabling them to meet the ever-changing demands and complexities of warfare. As William Murray observes, «The problem of adaptation in war represents one of the most persistent, yet rarely examined, problems that military institutions confront» (Murray, 2011: 10). This enduring issue highlights the necessity of embedding robust lessons learned (LL) systems within military organizations to foster continuous innovations, flexibility, and operational readiness. The ability to adapt effectively not only strengthens combat effectiveness but also reduces the risks posed by outdated strategies and tactics. In the face of modern high-dynamic conflicts, the ability to implement a learning process with superior efficiency and speed compared to an adversary becomes a decisive factor in achieving success and securing victory (Murray, 2011: 12).

The concept of «organizational learning» (OL) was first introduced by American scholars Richard Cyert and James March in 1963 (Cyert, March, 1963). It was later advanced by Chris Argyris, who published the first dedicated scientific study on the subject in 1977 (Argyris, 1977). Since then, the theory and practice of OL have advanced significantly, particularly in the military sphere, where the unique significance of learning is underscored by the severe consequences of repeating mistakes and neglecting critical lessons. However, a key issue observed in many military organizations is the disconnect between the theoretical recognition of learning importance and its practical implementation. As Nick Milton noted, «The phrase «lessons learned» has become ubiquitous, yet organizations struggle with developing effective lessons learned processes» (Milton, 2010: 7). Moreover, learning

in AF faces additional challenges due to its inherently hierarchical and bureaucratic structures, which often resist necessary changes and innovations.

There is a wide variety of definitions for OL. However, in the military context, this term can be defined as the establishment and systematic application of appropriate LL structures, processes, tools, and training to enhance collective learning capability through capturing and analyzing experiences, producing and disseminating lessons, and transforming knowledge into remedial actions (Dyson, 2019; Dyson, 2020; Pashchuk, 2024; NATO 2022). Military learning is primarily designed to improve organizational activities, refine doctrines, and update policies, strategies and tactics, ultimately increasing the adaptability and operational readiness of troops. Its overarching goal is to minimize the risks of repeating mistakes and increase the chances of achieving success and victories in the future.

From 1991 to the present day, the Ukrainian Armed Forces (UAF) have been realizing OL in the form of two consecutive LL systems (Dyson, Pashchuk, 2022):

1) System of Lessons Analysis and Dissemination (SLAD: December 1991–December 2018). This system was inherited from the Soviet Union and went through three stages of development: Stagnation (December 1991–May 2013); Reformation (May 2013–April 2014); Adaptation (April 2014–December 2018).

2) Lessons Learned System (LLS: January 2019–present). Due to the poor performance of SLAD, it was replaced by the perspective LLS that started its functioning in January 2019 based on NATO’s achievements in organizational learning. The implementation of the NATO LL process in July 2020 became a foundational pillar of the LLS (Dyson, Pashchuk, 2022; Doctrine 2020; SOP 2022).

As stated by NATO LL Handbook (NATO 2022: 17), «a LL process is part of a formal approach to OL that deliberately processes observed issues arising from an activity until either a LL is reached, or the lesson is rejected/noted for various reasons». The NATO LL process consists of two phases (NATO 2022: 17-22):

- 1) Analysis: Marked by the lessons identified or potential best practices (LI/PBP) as the outcome.
- 2) Implementation: Culminating in lessons learned or best practices (LL/BP) as a result.

The phases are divided into six stages: 1.1) Plan; 1.2) Observe; 1.3) Analyse; 2.1) Decide; 2.2) Implement and validate; 2.3) Share (Fig. 1).

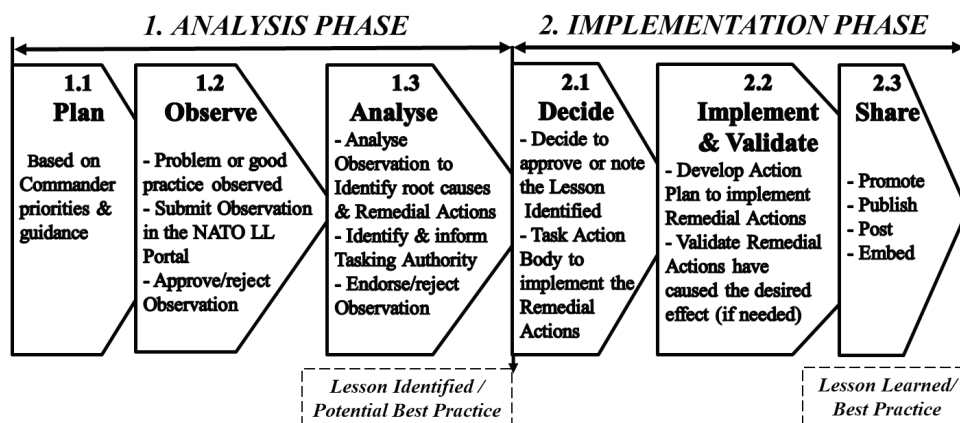


Fig. 1. The NATO LL process (NATO 2022: 18)

In line with modern neorealism theory, «the competitive international security environment, and especially the threat of defeat on the battlefield, should be a powerful incentive for the development of OL» (Dyson, 2019: 60-62). However, other factors, such as internal bureaucratic politics and imperfect military culture, can hinder the LL processes and negatively affect the ability of AF to facilitate effective changes, especially at the tactical and operational levels (Dyson, 2019).

In this context, the war initiated by Russia against Ukraine in 2014 significantly accelerated the reform of OL within the UAF and compelled their leadership to adapt the SLAD (Dyson, Pashchuk, 2022; Pashchuk, 2024):

1) Established the LL section, the first UAF's LL body, within the Anti-Terrorist Operation (ATO) Zone on 3 August 2014 (MSR 2018: 40).

2) Approved the Temporary LL Standard Operating Procedures (SOP) on 9 August 2014 (SOP 2014), which defined LL procedures within the ATO and outlined the responsibilities of the UAF's command and control bodies.

3) Introduced a list of urgent LL reports on 30 October 2014 (MSR 2018: 40-42).

As a result, the SLAD's primary focus was on analyzing and disseminating combat experiences from the ATO. This operation was succeeded by the Joint Forces Operation (JFO) in April 2018, a broader military campaign tailored to the evolving nature of the conflict (MSR 2020: 32). Throughout this transition, the SLAD maintained its critical role, systematically capturing lessons from the battlefield, analyzing operational successes and failures, and disseminating actionable recommendations.

The transformation of the SLAD (2014–2018) resulted in only a partial improvement in acquiring knowledge and experiences while maintaining a low level of potential absorptive capacity (Dyson, Pashchuk, 2022: 160). Despite the localization of the LL process within the ATO/JFO areas, a significant weakness in SLAD's functioning during this period was the inadequate collection of potential observations and the low quality of lessons analysis. The principal factor was the low learning awareness among UAF personnel, which hindered their engagement with the LL process. The absence of proper training for LL staff, many of whom lacked familiarity with and did not employ academic analysis techniques. Notably, national LL training courses within the UAF were introduced in June 2021 (Dyson, Pashchuk, 2022).

Additional challenges included the low assurance level of observations; insufficient time allocated to LL staff for conducting in-depth LL analyses; and chronic vacancies in LL positions. Moreover, the activity of LL officers was not prioritized. Their positions were usually viewed as transitional («passing through») and LL personnel were often diverted from their primary responsibilities to address other tasks (Dyson, Pashchuk, 2022; Pashchuk, 2024).

To enhance the LL capability in collecting and analyzing observations, the Army Scientific Centre (ASC) of the National Army Academy (NAA) initiated the creation of mobile lessons learned teams (MLLT) in May 2014 (MSR 2018; OT 1580/NOV 2014). In July 2014 the ASC developed an initial methodology for employing MLLTs, inspired by similar American teams of subject matter experts (SME) and cross-functional teams (CFT) used in the United Kingdom and Germany (AR 2006; Pashchuk, et al., 2015; Dyson, 2020). Over the subsequent decade, the UAF MLLTs underwent significant changes in both their activities and the approaches to their operation.

While advanced theoretical studies on OL have been conducted in leading countries, research on the UAF's LL practices remains limited. Ukrainian scholars have only partially explored this topic. For instance, researchers B. Semon, O. Skriabin, V. Hrytsiuk, and I. Yevsieiev analyzed learning in the Red Army during World War II, offering recommendations to enhance the UAF's LL capability (Pashchuk, 2024: 53). However, studies focusing specifically on the development of learning within the UAF are still scarce.

The importance of analyzing the role of MLLTs lies in their significant contribution to the LL process and the urgent need to improve the effectiveness of the LLS amidst the ongoing large-scale Russian aggression. This article examines three key aspects to better understand the potential of MLLTs in enhancing the UAF's learning capability:

1) The foundations for the establishment of MLLTs and the development of their methodologies.

2) The role and involvement of MLLTs in the LL process and their impact on organizational learning.

3) The analysis of MLLTs' adaptations and innovations during the Russo-Ukrainian War (2014–2024).

**Methodology and data used.** To execute the research tasks, an interdisciplinary scientific approach was employed. In particular, the historical-comparative method was used to study the similarities and differences in operation of MLLTs in the USSR (1942–1945), USA (1984–2024), Great Britain (2000–2024), Germany (2000–2024) and Ukraine (2014–2024). The historical-systematic method was applied to investigate the activities of different types of MLLTs, and changes in their structures and functions within two consecutive LL systems (SLAD and LLS). Special attention was focused on processing relevant source materials, including guiding documents, scientific reports, and memorandums.

**Results and discussion.** Starting from World War I, when semiformal LL procedures were first implemented, AF of various countries began widely utilizing MLLTs, primarily for the prompt and accurate analysis of acquired experiences (Dyson, 2020). From December 1991 to April 2014, OL within the UAF relied on the inherited Soviet LL system (Pashchuk, 2024: 53). This underlines the importance of examining the establishment and activities of MLLTs within the Red Army during World War II.

One of the primary challenges in Soviet learning, particularly during the early stages of the German invasion in 1941, was the inadequate LL analysis (Pashchuk, 2024: 54). To address this issue, MLLTs were introduced in the spring of 1942. These groups operated across all operational and operational-strategic formations and usually included representatives from the General Staff: at least two officers at the army corps level and three officers at the army or front level (Pashchuk, 2024: 54). The primary role of these squads was to verify the accuracy of initial operational reports and perform qualitative analyses of observations. The Soviet MLLTs operated within a semiformal LL process and the main limitation of these groups was their lack of dedicated LL training (Pashchuk, 2024).

The US AF were among the first to utilize MLLTs within a formal LL process. It is widely acknowledged that the initial team of this kind was the Army Studies Group, led by Colonel Wesley Clark in 1984. This team employed formal learning procedures to analyze the lessons of Operation Urgent Fury. Subsequently, with the establishment of the US Joint LLS in the late 1980s (Dixon, 2011: 227) MLLTs became known as SME teams (AR 2006: 13).

Since 2000, SME teams have been regularly deployed (for up to 30 days) to support troops engaged in the expeditionary operations of the US AF (Dixon, 2011). Their primary objective was to collect observations «on the heels» of operations and perform detailed, high-quality analyses as part of the initial phase of the standardized LL process, known as the Analysis Phase (Fig. 1). These teams operated within a formal framework for collecting operational experiences (AR 2006). Their activities were guided by approved plans for observations collection and analysis, with well-defined priorities. Typically, they employed semi-structured or structured survey methods to gather data (NATO 2011: 55-62).

In contrast to the SME teams, in the British and German AF in the 2000s, CFTs began to be widely applied during stage 2.2 (Implement and Validate) (Dyson, 2020: 7). The concept of using these teams was developed in the late 1980s and derived from innovative practices of civilian companies (Dyson, 2020: 7). Their key mission was to monitor the execution of remedial actions and assist in the implementation of LLs/BPs. The CFTs were distinguished from other MLLTs by their greater creativity and enhanced capacity to organize LL procedures (Holland, et al., 2000: 232). Their principal advantages lay in the fact that their representatives were directly responsible for the results, and, secondly, they were highly qualified specialists (Dyson, 2020). In addition, the employment of CFTs made it possible to overcome vertical lines of command and improve the speed and quality of decision-making in implementing remedial actions by avoiding information overload at higher levels (Dyson, 2020: 7-8; Henke, et al., 1993: 217).



The pioneer in the UAF to use MLLTs and develop their methodological support was the ASC (OT 1580/NOV 2014; Pashchuk, et al., 2015). To execute the order of the UAF General Staff 322/541 on 24 March 2014, the ASC staff prepared a report with proposals to improve OL in the UAF on 30 May 2014 (OT 1580/NOV 2014). Among important statements, the memorandum contained recommendations on the establishment and use of MLLTs, including their tasks, responsibilities, and employment methods. This was preceded by the analysis of practices of similar MLLTs in the Soviet Union, United States, United Kingdom, Germany, and other countries. The historical review of various «inspection-investigation» groups and different verification squads in the Soviet and Ukrainian AF was also used to evolve the methodology of MLLTs' operation (MSR 2018).

The first MLLT in the UAF was established on 17 November 2014 based on the ASC personnel and deployed in the 80th separate airmobile brigade (A0284) from 25 November 2014 to 12 December 2014 (OT 12/NOV 2015). The team consisted of 11 ASC staff members (5 officers and 6 civilians), including 5 doctors of philosophy (OT 12/NOV 2015). The primary selection criteria for members of this group were their gradual assignments in troops and headquarters, proper training, and multifunctional experiences. The central duty of this team was to collect, analyze, and summarise observations and other important information about combat experience that was not submitted or implemented for various reasons.

Unlike the permanent LL bodies in the ATO, the first MLLT was authorized to perform certain LL tasks with a temporary assignment to the A0284 unit under the order of the Commander-in-Chief of the Ukrainian Army (OT 12/NOV 2015). At that time, most of the brigade personnel had been withdrawn from the ATO on rotation and were in the place of permanent deployment.

Following a preliminary agreement with the brigade commander, a list of respondents to the planned survey was completed and coordinated a few days before the MLLT's deployment. All brigade personnel were invited to participate in the survey voluntarily and use the right of anonymity. The semi-structured interview tool was developed by the ASC and 49 servicemen were interviewed (OT 12/NOV 2015). The members of the MLLT also used other methods of data gathering: study of various operational documents; «round table» method; technique of individual interview; structured questionnaire, etc.

As a result of the first MLLT operation, a report was developed, which included an analysis of outcomes of the conducted survey, a list of potential LI/BP, and proposals for improving the training and employment of Ukrainian troops. Additionally, the document contained recommendations for improving the MLLT methodology including samples: plan for MLLT employment; plan for studying LL information; survey questionnaires; questions for gathering LL data; and final report.

Subsequently, in just one year, the ASC participated in nine MLLTs in the following units (MSR 2018: 24-25):

- 1) 24th separate mechanised brigade: 24 December–30 December 2014; 26 January–31 January 2015.
- 2) 80th separate airmobile brigade: 5 February–27 February 2015.
- 3) 128th separate mountain infantry brigade: 17 February–27 February 2015.
- 4) 199th Training Centre of the Highly Mobile Airborne Troops: 25 May–30 May 2015; 8 June–12 June 2015.
- 5) 74th centre of information and psychological operations: 21 March–21 April 2015; 26 May–26 June 2015.
- 6) 95th separate airmobile brigade: 10 November–23 November 2015.

In doing so, the MLLTs performed the following primary tasks (OT 12/NOV 2015):

Collect, analyze, and summarise information about combat experiences.

Identify the main causes of problems in the Ukrainian Army employment, develop potential LIs/BPs, and relevant remedial actions.



Supervise dissemination of the ATO LLs/BPs and check LL informing of the personnel.

Assess the learning effectiveness in military units, in particular, the quality of collecting and analyzing LL data.

Create the LL database based on the obtained potential LIs/BPs for use within the National Army Academy.

In addition, the MLLTs were engaged in improving their methodology. One of the duties of each MLLT member was to evaluate the outcomes of the team's activity and provide propositions for improving the MLLT's methodology. First of all, it concerned testing and estimating of used methods for collecting and analyzing observations, particularly semi-structured surveys and LL analysis techniques.

Ground on the operation of each MLLT, reports were sent to the higher commander (headquarters), who ordered the assignment of the corresponding team (OT 297/NOV 2019). Such documents included the potential LIs/BPs, recognized problems in the training and employment of troops, causes of such issues, and recommended remedial actions. In particular, these reports contained proposals on:

Amending the UAF doctrinal and guiding documents.

Timely and high-quality preparation of military units for employment in the ATO zone.

Improvement of the organizational structures of military units.

Modernization of existing and development of new weapons and military equipment.

Ensuring proper training of cadets and officers, etc.

For instance, from 2014 to 2018 the MLLTs provided important recommendations, among which the following should be highlighted (MSR 2018: 53-56):

«Changes to the course of firing from small arms and combat vehicles that are used in the Ukrainian Army».

«Recommendations on procedures for activities of the military unit commander and headquarters staff during the preparation for operation (Part 2)».

«Recommendations for use of 9k115 Metis and 9k111 Fagot anti-tank missile systems».

«Proposals on tactics of using unmanned aerial systems».

«Guidelines for activities of military personnel in the training centers on the organization of training of mobilized servicemen on the example of the 184th Training Centre».

«The use of military units in maneuver defence».

«Recommendations for improving the effectiveness of counterintelligence tactics in the ATO zone».

From 2014 to 2018, the MLLTs operated within the SLAD that was based on semiformal LL procedures (Dyson, Pashchuk, 2022). This period can be defined as the first (Formation) stage of such groups' activities. During this time the MLLTs were created and their methodology was initiated and tested. These squads were usually used in the first (Analysis) phase of the semiformal LL process. Their leading role in OL within the UAF was the increased efficiency in collecting and analyzing observations. The LL information gained by the MLLTs was primarily transformed into potential LIs/BPs, and implemented in relevant reference materials, methodological guides, memos, and schemes. However, a significant limitation of MLLT functioning during this period was the absence of formal LL guiding documents.

Five years of enduring Russian aggression (2014–2018) has revealed an urgent need for enhancing the UAF LL capability. It became clear that the SLAD has been ineffective, and all its key components (LL structure, process, and tools) have required radical modernization. In August 2018, the UAF leadership initiated significantly improving OL by creating a fundamentally new Lessons Learned System. The LLS Roadmap was developed in November 2018 and is based on NATO LL practices. Building the LLS meant the final transition from the semiformal to the formal LL process. Hence, starting in January 2019, the second stage (Modernization) in the MLLTs' employment began.

The initial step in this direction was the development of the Concept of MLLTs' Operation by the ASC experts in December 2018 (MSR 2018: 64-72). The document outlined the purpose of these teams, staffing requirements, primary tasks, operational algorithms, and tested methods for collecting and analyzing observations. The Concept provisions served as the foundation for the relevant sections on MLLT activities in the UAF LL Doctrine and the Temporary UAF LL SOP, issued in July 2020. Accordingly, the MLLT was defined as "a temporarily created squad for the prompt study of lessons and monitoring of experiences implementation" (Doctrine 2020: 12; SOP 2020: 12). Additionally, it was stipulated that these teams "may be involved in the execution of LL Process procedures, if necessary" (Doctrine 2020: 18; SOP 2020: 15).

Significant advancements in refining MLLT operations were achieved within the Land Forces with the approval of the following documents by their Command:

- 1) The Temporary Army MLLT SOP in January 2023 (Army SOP MLLT 2023).
- 2) The Temporary Army LL SOP in September 2023 (Army SOP 2023).

During the second (Modernization) phase the MLLTs underwent radical changes. First of all, the number of the MLLTs and the duties they perform have increased. The spectrum of tasks performed by such squads also significantly expanded. In addition to the prompt collection of observations and their analysis, the MLLTs were involved in an in-depth analysis of past important events, in particular, the UAF operations at the beginning of the Russo-Ukrainian War (2014–2016). Also, these teams started to monitor the organization of the LL Process in military units and formations assessing its effectiveness.

Throughout the Modernization stage, significant progress was made in the LL training of UAF personnel. On May 18–20, 2021, the first LL course, attended by 43 LL officers, was conducted by the NATO Advisory and Training Team in Lviv. Subsequently, two national LL courses were held at the NAA: on June 14–18, 2021 (19 officers), and October 18–23, 2022 (20 officers). During the full-scale Russian aggression, from May 29 to July 4, 2023, a mobile LL training group trained 174 LL officers directly in UAF military units and formations. As a result, between 2021 and 2023, a total of 256 officers completed LL courses, many of whom later participated in MLLTs' operations. This had a serious impact on enhancing the quality of MLLTs, particularly in improving their effectiveness in collecting and analyzing observations.

Thus, the second phase of MLLTs' activities (Modernization) fundamentally differs from the first phase (Formation). A corresponding regulatory framework for the functioning of MLLTs has been developed, and significant adjustments to their operation have been implemented.

Based on the historical analysis of MLLTs' operation within the UAF during the Russo-Ukrainian War (2014–2024) it is proposed to divide these teams into three types in line with their functional purpose:

1. «Collect and Analyse observations» (1st phase of the LL process: stages 1.2. Observe and 1.3. Analyse).

It is worth distinguishing between the following two categories of this type:

- 1.1. «Rapid Reaction Lessons Learned Teams». This refers to MLLTs deployed to identify lessons «in hot pursuit», typically within a short timeframe, usually up to three months, following significant events or combat operations. The vast majority of MLLTs utilized by the UAF before February 24, 2022, fell into this category. These groups collected and analyzed observations during the duty trips to units, which were mainly based in places of permanent deployment after rotation (withdrawal from combat zone). Since the beginning of the full-scale war, such squads have been working primarily in units located in the forward combat area, as well as in places where troops were restored to combat readiness.

At the onset of the full-scale Russian invasion, most incoming LL data was of poor quality, necessitating further clarification and verification. After the initial processing of this information, it often

became necessary to deploy specialized MLLTs to the battlefield for more in-depth examination. For these missions, officers from the UAF General Staff, along with representatives from scientific and military educational institutions, were engaged. These teams primarily focused on conducting comprehensive verification of key findings derived from the preliminary analysis of combat experiences.

1.2. «Deliberate Lessons Learned Teams». Such groups are used for a thorough study of a particular operation or a series of operations that took place in the «recent past», for example, a year or several years later. These teams are used when, over time, there is an urgent need to study more thoroughly the previous lessons that have not been properly analyzed for various reasons. In this case, the special methods of collecting information are interviewing eyewitnesses of the above events and working with relevant archival documents, reports, and memorandums. For example, between April 2021 and June 2021, seven MLLTs worked under the command of the General Staff. These groups conducted a comprehensive study of the UAF's employment in the Russo-Ukrainian War in Donbas between April 2014 and December 2016, when the most intense operations were taking place.

2. «Supervise and assist in lessons implementation» (2nd phase of the LL Process: stage 2.2. Implement and Validate). An example of these squads are the CFTs used in the British and German AF. The UAF have not employed such teams and there is still a «gap» between two learning phases, which means that obtained LIs/PBPs are mostly informative, and not mandatory for implementation (Dyson, Pashchuk, 2022; NATO 2020).

3. «Monitor and evaluate the learning process». An example of such team is the experimental MLLT, comprising ten military experts, including staff officers and scientists, which was deployed to the JFO headquarters in January 2022. Their primary responsibility was to analyze learning effectiveness in the JFO zone and provide recommendations for its improvement. The team was supposed to work in two phases: from January 20, 2022, to April 20, 2022, and from April 21, 2022, to July 20, 2022.

In addition to the previously mentioned advancements, other significant innovations deserve attention, particularly the introduction of integrated MLLTs at the beginning of 2023. These teams were designed to combine the functions of the first and third types of MLLTs, increasing their versatility and operational effectiveness. Furthermore, in the summer of 2023, MLLTs began incorporating representatives from the General Staff and were initially tasked with collaborating directly with units. Over time, these teams expanded their scope to include activities within operational and operational-strategic formations. As of today, nearly all MLLTs are staffed by General Staff officers, primarily from the Main Doctrine and Training Department (J-7), ensuring enhanced expertise and alignment with learning priorities. By the end of 2024, additional permanent MLLTs had been established within operational commands, further institutionalizing their role in the UAF.

Although MLLTs have consistently demonstrated their value and importance, chronic deficiencies in OL within the UAF continue to hinder the effective and broader use of these squads. A primary issue lies in the persistent lack of attention from senior military leadership toward the operation and potential of MLLTs. Moreover, there remains a low level of awareness among UAF personnel about the learning principles, the significance of MLLTs, and the need to actively support their activities.

It is crucial for the UAF to adopt proven NATO best practices in employing MLLTs, especially CFTs, which have proven effective in improving OL and, most importantly, in addressing the existing «gap» between lessons identification and implementation.

Another critical shortcoming is the lack of a methodological framework for MLLT operations aligned with NATO standards. For instance, the UAF has yet to adopt the NATO LL Analysis SOP (NATO 2016), which is essential for ensuring a systematic approach to the LL process. To address these and other pressing issues, it is strongly recommended to update the UAF LL guiding documents. Specifically, this revision should include:

1) A more precise definition of MLLT (Doctrine 2020: 12; SOP 2020: 12): «A working (mobile) lessons learned team is an ad hoc unit operating within the framework of the standardized lessons learned process to collect and analyze observations, identify potential lessons and best practices, oversee the execution of remedial actions and their validation, monitor the lessons learned process, and evaluate its effectiveness».

2) Clearly articulated objectives (Army SOP MLLT 2023: 8): «The main purpose of mobile (working) lessons learned teams is to enhance the analytical capacity of organizational learning, as well as to improve coordination and integration across its key functional areas, thereby increasing the pace and effectiveness of the lessons learned process within the UAF».

3) Detailed methodologies and techniques for MLLTs employment.

**Conclusions.** In the UAF, mobile lessons learned teams were first introduced in November 2014, integrating best international practices with Ukrainian adaptations. Over the subsequent decade, significant developments in the operation and methodological support of these teams occurred, particularly following the full-scale Russian invasion in February 2022. The number of MLLTs, their scope of responsibilities, and the range of tasks they undertake have expanded substantially. Such squads have become a critical component of the formal LL process and a key tool for acquiring important lessons within the UAF. The most significant Ukrainian innovations include: the deployment of MLLTs for monitoring and evaluating the LL process; operation not only in units but also in operational and operational-strategic formations; utilization of MLLTs of various and integrated types; inclusion of General Staff officers in the MLLTs; establishment of permanent MLLTs within operational commands.

The scientific and practical value of this paper lies in its systematic analysis of MLLTs' employment within UAF, including a historical-comparative study of similar groups in other countries. The research identifies two distinct stages of MLLTs' development (Formation (2014–2018) and Modernization (2019–present)), refines their classification based on functional purposes, and highlights their leading role in the UAF's organizational learning. Additionally, the paper provides actionable recommendations for improving MLLTs operations and updating doctrinal documents to align with best practices and NATO standards.

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